

## Chapter 8: Completing CDBG Activities

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## 8.1.1 Overview

The Community Development Block Grant (CDBG) program annually allocates funds to metropolitan cities and urban counties, to States for use in non-entitled areas, to four insular areas, and to three non-entitled counties in the State of Hawaii. The funds are allocated in accordance with formula factors such as population, poverty, etc. CDBG relies on Census data to tabulate information that assists in the funding allocation process.

This chapter describes the CDBG path screens that are used by all CDBG grantees to enter CDBG-specific beneficiary and funding information. The information you provide on these screens becomes the basis for annual reporting to HUD and your constituents.

Effective with IDIS Version 6.7, entitlement grantees will not be able to fund a CDBG activity unless the specific required information is entered.\* State grantees will not be subject to these new requirements but will still be responsible for entering all common path and CDBG path data previously required by IDIS.

Entitlement grantees must complete all required fields on the first CDBG NATIONAL OBJECTIVE screen (CDBG01) and the CDBG Activity screen (CDBG06), before the activity can be funded with CDBG funds.\* Depending on the national objective of the activity, IDIS may require additional information before certain screens can be saved.

Each section of this document describes those fields that are required before funding and those that are required before the user can continue down the screen path.

CDBG NOC	IDIS Screen Name	Requires
All (except admin and planning activities)	Setup Activity screen (CO4MA04)	Proposed Accomplishments (Type and Units cannot be blank)
All (except admin and planning activities)	Setup Activity screen (CO4MA01)	Complete address/location, zip, and description of an activity
LMJ, LMJFI, LMJP	Job Creation/Retention (CDBG11)	A non-zero value is required in at least one of these fields: Expect to create, Expect to retain  For both of these fields: if Total F/T contains an entry, require an entry in Total F/T LM. If Total hours P/T contains an entry, require an entry in Total hours P/T LM.
SBA	Slum/Blight Area screen (CDBG12)	Boundaries

\* This requirement does not apply to: 1) Activities being carried out by States; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

CDBG NOC	IDIS Screen Name	Requires
		Percentage deteriorated buildings Slum/blight designation year
LMH, LMHSP, with "Y" for Multi-Unit Housing on CDBG06	CDBG Multi-Unit Housing Activity screen (CDBG14)	(You may enter "0" as a valid value)  Total units at start  Total units occupied at start  Total units occupied by low/mod at start  Total units expected at completion  Total units expected to be occupied at completion  Total units expected to be occupied by low/mod at completion
LMA	Area Benefit Data (CDBG07)	The % of low/mod in Service Area must be 51% or greater unless the grantee is an "exception" as identified by HUD. In those cases, the % of low/mod must be equal to or greater than the exception percentage. (Effective release 9.0.)

**REMINDER:**

For CDBG Entitlement grantees, you do not need to fill in any Completion Path screens for planning and administrative activities. After you select CDBG as the funding source on the Activity Setup screen (CO4MA08), when the CDBG NATIONAL OBJECTIVE screen is displayed, leave the National Objective Code field blank and press <Enter> to immediately return to the Activity Setup screen.

CDBG State grantees may need to complete the Direct Benefit screen (CDBG08) and Beneficiary Income Levels screen (CDBG13) for all National Objectives *and* for admin activities with a matrix code of 20, if appropriate.

Release 9.0 changes the information collected on the CDBG path in IDIS primarily to address specific issues raised by OMB in its PART review of the CDBG program, increase navigation efficiency for grantees, and provide more uniform data collection to increase data accuracy.

The CDBG path screens have been renamed and numbered as listed below. These screens will appear only when applicable to the type of activity being carried out.

<u>New</u>		<u>Old</u>
<u>Screen Name</u>	<u>Description</u>	<u>Screen Name</u>
CDBG01	CDBG National Objective	N/A
CDBG02	Funding Sources	N/A
CDBG03	Organization Carrying Out Activity	CDBG03
CDBG04	CDBG Activity: Subrecipient/CBDO/ 105(a)(15) Questions	CDBG04
CDBG05	Form of Assistance	N/A
CDBG06	CDBG Activity Information	C04MC01
CDBG07	Area Benefit Data (Census Tract Screen)	C04MX03
CDBG08	CDBG Direct Benefit Data (Racial data screen)	C04MA05
CDBG09	CDBG Housing Rehabilitation	N/A
CDBG10	CDBG Nature/Location	C04MA06
CDBG11	CDBG Job Creation/Retention	C04MA07
CDBG12	Slum/Blight Area	C04MX02
CDBG13	Beneficiary Income Levels	C04MC02
CDBG14	CDBG Multi-Unit Housing Activity	C04MC04
CDBG15	CDBG Displacement	C04MC03
CDBG16	CDBG 1-1 Replacement	C04MC06

The following new screens display cumulative totals and are for display purposes only:

CDBG51	Beneficiary Summary	N/A
CDBG52	Income Category Summary	N/A
CDBG53	Job Creation/Retention Summary	N/A

The following are new names for help screens and other screens not on the main CDBG path:

CDBG-H1	Revise CDFI	C04MU11*
CDBG-H2	CDFI Areas	C04MU12*
CDBG-H3	Strategy Selection Screen	C04MU13*
CDBG-H4	Strategy Areas	C04MU14*
CDBG-H5	CDBG Error Resolution	
CDBG-H6	Matrix Code Help Screen	
CDBG-H7	National Objective Code Help Screen	
CDBG-H8	Accomplishment Code Help Screen	

CDBG-H9     CDBG Displacement Balance Resolution Screen     C04MC07  
CDBG-H10    Race Code Help Screen

\* These screen numbers are still used when the screens are accessed when entering F 04 from the IDIS main menu.

A few fields previously entered on some screens are no longer associated with the replacement screen. Below is a list of individual items that were moved to new screens:

- 1) National Objective Code, Regulation Citation, and Unliquidated Obligations have been moved from the C04MC01 screen to the CDBG01 screen.
- 2) Loan information previously entered on the C04MA07 screen has now been moved to the CDBG05 screen.
- 3) "CDBG Other" amount previously entered on the C04MA07 screen has now been moved to the CDBG02 screen.
- 4) The old C04MC05 screen has been dropped from the CDBG path. It was determined that the unit counts previously entered on this screen could be derived from other data already entered in the system. The "Other" amount previously entered on this screen can now be found on the CDBG02 screen.
- 5) Presumed Benefit and Nature/Location questions have been moved from the C04MA05 screen to the CDBG06 screen.

## 8.2 Selecting CDBG on the Activity Setup “Money” Screen (C04MA08)

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### Getting To the Money Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or you do not need to complete the field, press **<Tab>** to go to the next field.)

1. On the IDIS Main Menu, select **Option B**, Revise Activity. The system displays the Revise Activity Screen (C04MA09).
2. Type the Project Number and Program Year for the activity, or press **<F2>** to select the Project Number/Program Year from the list displayed.

After the list appears, type **X** next to the one activity you want to revise, then press **<Enter>**. The system displays the Revise Activity Screen (C04MA10). This is the first screen in the four-screen Setup Activity common path.

3. Press **<Enter>** to move through the next two screens in the common path, the Process Activity Screen (C04MA03) and the Setup Activity Screen (C04MA04). You should now see the Setup Activity “Money” Screen (C04MA08).

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### SCREEN: Setup Activity screen (C04MA08)

**PURPOSE:** This screen serves two purposes: use the top third of the screen to give your activity a budget (or increase the budget if the amount displayed is too low); use the bottom portion of the screen to select CDBG as the funding source and go to the first CDBG program screen, the CDBG NATIONAL OBJECTIVE screen (CDBG01). For more information on completing the money portion of this screen, read [Chapter 4](#).

In this chapter, you will only see the sequence of screens that let you enter CDBG beneficiary and accomplishment information.

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### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to display the program-specific completion path you selected.



**TOTAL ESTIMATED  
AMOUNT**

1. Type the estimated sum, in dollars and cents, of funding your activity will receive from all CPD formula programs, including program income. (You can use dollar signs but not commas.) Effective with Version 9.0, on an LMA activity for Entitlements, the activity must still meet the low/mod % before allowing an increase in the estimated amount.

**ENTER (X) TO SELECT  
PROGRAM**

2. Place an **X** next to CDBG, then press **<Enter>**.

You will then see the CDBG-specific series of screens. After processing the CDBG program-specific screens, you will see the Setup Activity Screen (C04MA08) displayed again.

For admin, technical assistance and planning activities being carried out by entitlement grantees, you still need to select CDBG as the funding source of the activity on this screen and then press **<Enter>**. When the CDBG NATIONAL OBJECTIVE screen is displayed, you do not need to fill in any information; simply press **<Enter>** to return to this screen.

You cannot select CDBG for activities with an IDIS Activity ID of 1 through 4.

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12/12/02	06:40	SETUP ACTIVITY	C04MA08
GRANTEE ACTIVITY NBR: C01-050		HUD ACTIVITY NBR: 000000001580	
ACTIVITY NAME: RECREATION IMPROVEMENTS - WOMELSDORF			
TOTAL ESTIMATED AMOUNT:		\$25,000.00	
INDICATE PROGRAM(S) TO BE ADDRESSED			
ENTER (X) TO SELECT PROGRAM, (D) TO DELETE EXISTING PROGRAM PATH			
	X	CDBG	
	=	ESG	
	-	HOME	
	-	HOPWA	
F3 = VALDT F4 = MAIN MENU F5 = PROJ INFO F7 = PREV F8 = NEXT			
F9 = SAVE F10 = MA09 F13 = DELETE			

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Total Estimated Amount	✓	What is the estimated total amount of dollars and cents from all CPD formula programs that will be used for this activity? (When you use the Activity Funding options, IDIS will not let you fund more dollars than the amount entered on this screen.)	\$nnnnnnnnnn.nn
Enter (X) to Select Program	✓	Select <b>CDBG</b> as the funding source for this activity.	X
Press <Enter> to display the first CDBG completion path screen, the CDBG NATIONAL OBJECTIVE Screen (CDBG01).			

## 8.3 Choosing a CDBG Completion Path

The CDBG completion path screens that you need to complete for a CDBG activity depend on the Matrix Code that you previously entered on the Process Activity screen (CO4MA03), the National Objective Code (NOC) you enter on the CDBG NATIONAL OBJECTIVE Screen (CDBG01), and whether you are an entitlement grantee or a State grantee (including Insular areas). State grantees may need to complete two additional beneficiary screens for LMA\* and SBA, SBR, SBS, and URG activities.

### CDBG Completion Path Flow:

1.	On the CDBG NATIONAL OBJECTIVE (CDBG01), enter the appropriate National Objective Code. (This is not required for admin, technical assistance, and planning activities being carried out by Entitlement grantees, or matrix code 22 activities using unprogrammed funds.)
2.	<p>For entitlements, generally, the screens you process to complete a CDBG activity are determined by the National Objective code you enter.</p> <p>For States, you will see the Direct Benefit screen (CDBG08) and Beneficiary Income Levels screen (CDBG13) for LMA* and SBA, SBR, SBS, and URG national objectives;</p> <p>LMA*      See Section 8.5</p> <p>LMC*      See Section 8.6</p> <p>LMH*      See Section 8.7</p> <p>LMJ*      See Section 8.8</p> <p>SBA/ SBR/ SBS/ URG      See Section 8.9</p>
3.	For all National Objective Codes, if you X'd Displacement Activities on the CDBG Activity Information Screen (CDBG06), enter the displacement data on the CDBG Displacement Screen (CDBG15). See Section 8.10.1
4.	For all National Objective Codes, if you X'd One To One Replacement on the CDBG Activity Information Screen (CDBG06), enter the replacement data on the CDBG 1-1 Replacement Screen (CDBG16). See Section 8.10.2

## 8.4 Selecting a Completion Path by National Objective (CDBG01)

**SCREEN:** CDBG NATIONAL OBJECTIVE screen (CDBG01)

**PURPOSE:** This screen, the first in the CDBG path, lets you apply a National Objective Code (NOC) to your CDBG activity. You can also indicate any unliquidated obligations for the activity on this screen. Also, if you discover that the wrong matrix code was applied to the activity (entered on the MA03 screen), you have the option of revising the matrix code on this screen, in which case, the new matrix code will then appear on the MA03 screen.

For admin and planning activities being carried out by Entitlement grantees, always leave the National Objective Code field blank.

Effective with IDIS Version 6.3, planning activities (matrix code 20) being carried out by State grantees may require completion of two beneficiary screens, the CDBG Direct Benefit Screen (CDBG08) and the CDBG Beneficiary Income Level screen (CDBG13).

Effective with Version 6.7, most entitlement activities will require additional setup information before you can fund the activity. Refer to the Overview of this chapter, Section 1.1.1, for a specific list of the NOCs affected.

Once the activity is underway and you know the beneficiary and accomplishment information, you will need to update the accomplishment and beneficiary information. Refer to [Guidance for Reporting CDBG Accomplishments in IDIS](#) for a better understanding of what the Office of Block Grant Assistance (OBGA) requires for annual reporting.

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### How To Complete This Screen:



#### MATRIX CODE

Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to go to the next screen in the CDBG path.

1. The matrix code you entered on the MA03 screen will be displayed in this field. You will be allowed to change it on this screen if you find you have assigned an incorrect matrix code.

**CDBG REGULATION  
CITATION**

2. The default regulation citation for entitlement activities is based on the Matrix Code you entered on the Process Activity (CO4MA03) screen. No citation will display for State activities.

For entitlement communities, review the Regulation Citation and change it, if incorrect. Except for certain admin and planning activities\*, the screen must contain a valid regulation citation before you can save the screen.

For States, you may optionally enter a Regulation Citation.

**CDBG NATIONAL  
OBJECTIVE**

3. Type the National Objective Code for this activity or press <F1> with the cursor in this field to select the NOC from the list displayed. (The next section describes how to do this.)

**OBJECTIVE CITATION**

4. This field is populated by the system and is for display only.

For Entitlements, this field will show the default citation that corresponds to the national objective code you entered.

For States, this field will remain blank.

**UNLIQUIDATED  
OBLIGATIONS**

3. Type the amount, in dollars and cents, of orders placed, contracts and grants awarded, goods and services received, and similar transactions for which an expenditure has not been reported as of the end of the reporting period for this activity.

**Change to Activity ID**

4. This field can be used to switch to a different CDBG activity which belongs to you, eliminating the need to go back out to the MAIN MENU to select a different activity id.
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\* This requirement does not apply to: 1) admin and planning activities with a matrix code of 19A, 19B, 19F, 19G, 19H, 20, 21\*, 22; 2) Activities being carried out by States. For States, you may optionally enter a Regulation Citation but it is not required before you can save the screen.

MM/DD/YY	HH:MM	CDBG NATIONAL OBJECTIVE	CDBG01
Grantee Activity ID		xxxxxxxxxxxxxxxxxxxxxx	IDIS Activity ID
Activity Name		xx	
Matrix Code:		_____xx	
CDBG Regulation Citation:		_____	
National Objective Code:			
Enter the National Objective Code that applies: _____			
National Objective Citation: xxxxxxxxxxxxxxxxxxxxxxxxx			
(Admin matrix codes do not require a National Objective Code)			
Unliquidated Obligations: _____			
Change to Activity ID _____			
F1=HELP    F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT F9=SAVE    F10=REVISE ACTIVITY			

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
IDIS Activity ID		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Matrix Code	✓	Carried forward from the Setup Activity Screen (C04MA03)	3 alphanumeric characters.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
CDBG Regulation Citation	✓	<p>The default regulation citation for entitlement activities is based on the Matrix Code you enter. No citation will display for State activities unless one was entered previously.</p> <p>For entitlement communities, review the Regulation Citation and change it, if incorrect. Except for certain admin and planning activities, the screen must contain a valid regulation citation before you can save the screen.</p> <p>For States, you may optionally enter a Regulation Citation.</p>	13 alphanumeric characters.
Natl/Obj	✓  (except for admin, TA, and planning activities)	What is the National Objective Code (NOC) for this activity> To view a list of codes, press <F1>.	5 alphanumeric characters.
CDBG Objective Citation		System generated based on the National Objective Code you entered.	Protected field
Unliquidated Obligations		Type the amount, in dollars and cents, of orders placed, contracts and grants awarded, goods and services received, and similar transactions for which an expenditure has not been reported as of the end of the reporting period for this activity.	\$nnnnnnnnnn.nn
Press <Enter> to save the information and move to the next screen in the completion path.			

## 8.4.1 Looking Up the National Objective Codes

**SCREEN:**                      **National Objective Code screen**                      **(CDBG-H7)**

**PURPOSE:** Before you can fund the activity, most CDBG activities (except for admin, technical assistance, and planning activities) require you to indicate the national objective being met by the activity.

You enter the National Objective Code (NOC) on the CDBG NATIONAL OBJECTIVE Screen (CDBG01). If you do not know the appropriate code, press <F1>. IDIS will display a list of NOCs that correspond to the Matrix Code you entered. Review the displayed codes on the screen, select the desired code by enter the national objective code in the selection field, then press <Enter>. (The NOC codes are also listed in [Appendix B](#).)

08/26/05	08:47	NATIONAL OBJECTIVE CODE HELP SCREEN	CDBG-H7
CODES FOR MATRIX "14F" ONLY ARE DISPLAYED.			
Select: _____			
LMH    LOW/MOD HOUSING BENEFIT			
LMHSP LOW/MOD HOUSING BENEFIT, CDFI/STRATEGY AREA			
SBA    SLUMS/BLIGHT AREA BENEFIT			
SBR    SLUMS/BLIGHT URBAN RENEWAL BENEFIT			
SBS    SLUMS/BLIGHT SPOT BENEFIT			
URG    URGENT NEED			
TYPE SELECTION AND PRESS <ENTER>.			
PF7=PREV			



### 8.4.1.1 Reviewing the National Objective Code References

The National Objective Code of each CDBG activity determines the sequence of screens you will need to complete to keep the activity updated with accomplishments. For instance, if you select a National Objective Code of LMH, you will enter data on the screens associated specifically with Low Mod Housing.

#### National Objective Codes:

Code	Description	24 CFR Citation
LMA	Low/mod area benefit: the service area identified for activities is primarily low/mod income.	570.208(a)(1)
LMAFI	Low/mod area benefit, Community Development Financial Institution (CDFI): activities that are carried out by a CDFI for the purpose of creating or retaining jobs which the grantee may elect to consider as meeting the low/mod area benefit criteria.	570.208(d)(6)(i)
LMASA	Low/mod area benefit, Neighborhood Revitalization Strategy Area: activities that are carried out for the purpose of creating or retaining jobs pursuant to a HUD-approved Neighborhood Revitalization Strategy which the grantee may elect to consider as meeting the low/mod area benefit criteria.	570.208(d)(5)(i)
LMC	Low/mod limited clientele benefit: activities that benefit a limited clientele, at least 51% of which are low/mod income.	570.208(a)(2)
LMCMC	Low/mod limited clientele, Microenterprise: microenterprise activities that are carried out under 24 CFR 570.201(o) and the owner(s)/developer(s) are low/mod income.	570.208(a)(2)(iii)
LMCSV	Low/mod limited clientele, Job service benefit: activities designed to provide only job training, placement and/or support services in which the percentage of low/mod persons assisted is less than 51%, but the proportion of the total cost paid by CDBG does not exceed the proportion of the total number of persons assisted who are low/mod.	570.208(a)(2)(iv)
LMH	Low/mod housing benefit: activities that are carried out for the purpose of providing or improving permanent residential structures that will be occupied by low/mod income households.	570.208(a)(3)
LMHSP	Low/mod housing benefit, CDFI or Neighborhood Revitalization Strategy Area: activities that are carried out for the purpose of providing or improving permanent residential structures by a	570.208(d)(5)(ii) and (d)(6)(ii)

Code	Description	24 CFR Citation
	CDFI or pursuant to a HUD-approved Neighborhood Revitalization Strategy (NRS) which the grantee elects to aggregate and consider a single structure for purposes of determining national objective compliance. For example, if two single family homes were rehabilitated in an NRS, they may be considered a single structure and at least one must be occupied by a low/mod household; if ten single family homes were assisted, at least 6 (51%) must be occupied by low/mod households.	
LMJ	Low/mod job creation/retention: activities designed to create or retain permanent jobs, at least 51% of which will involve the employment of low/mod persons.	570.208(a)(4)
LMJFI	Low/mod job creation/retention, Public facility/improvement benefit: activities where a public facility/improvement is undertaken principally for the benefit of one or more businesses that will result in the creation/retention of jobs.	570.208(a)(4)(vi) (F)
LMJP	Low/mod Job creation, location based: activities where a job is held by or made available to a low/mod person based on the location of the person's residence or the location of the assisted business.	570.208(a)(4)(iv)
SBA	Slum/blight area benefit: activities that address prevention or elimination of slums or blight in a designated area.	570.208(b)(1)
SBR	Slum/blight in an urban renewal area: activities that address prevention or elimination of slums or blight in an urban renewal area in which activities were authorized under an Urban Renewal Loan and Grant Agreement and are necessary to complete the urban renewal plan.	570.208(b)(3)
SBS	Slum/blight spot basis: activities that address conditions of blight or physical decay on a spot basis not located in a slum/blight area.	570.208(b)(2)
URG	Urgent need: activities that are designed to alleviate existing conditions of recent origin that pose a serious/immediate threat to the health/welfare of the community, and the grantee is unable to finance the activity on its own nor are other funds available.	570.208(c)

## 8.5 The CDBG LMA Path Screens

When you select a National Objective Code of LMA, LMAFI, or LMASA on the CDBG NATIONAL OBJECTIVE Screen (CDBG01), the system displays this series of screens.

Entitlement Grantees	State Grantees
Funding Sources (CDBG02)	Funding Sources (CDBG02)
Organization carrying out activity (CDBG03)	Organization carrying out activity (CDBG03)
Subrecipient/CBDO Screen (CDBG04)	Organization Carrying Out Activity - Cont. (CDBG04)
Form of Assistance (CDBG05)	Form of Assistance (CDBG05)
CDBG Activity Screen (CDBG06)	CDBG Activity Screen (CDBG06)
Area Benefit Data Screen (CDBG07)	Area Benefit Data Screen (CDBG07)
*If Matrix Code 18a or 18b, Job Creation/Retention Screen (CDBG11) <i>See Section 8.8.4</i>	*CDBG Direct Benefit Data Screen (CDBG08) <i>See Section 8.7.4</i>
*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>	*CDBG Beneficiary Income Levels Screen (CDBG13) <i>See Section 8.7.5</i>
*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>	*If Matrix Code 18a or 18b, Job Creation/Retention Screen (CDBG11) <i>See Section 8.8.4</i>
	*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>
	*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>

(Screens with an \* are used by more than one NOC and are described elsewhere in this chapter.)

## 8.5.1 Entering Funding Sources Data (CDBG02)

**SCREEN:** Funding Sources screen **(CDBG02)**

**PURPOSE:** This screen lets you provide information regarding leveraging of funds and the cost of carrying out this activity.

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### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.) Amounts should be entered in dollars and cents. (Example: \$1050.50 would be entered 1050.50. \$2000.00 would be entered as 2000.00)

When you have completed the fields on this screen, press **<Enter>** to go to the next screen in the path.

#### CDBG Funds

1. This field is for display only. It will show the amount of CDBG money funding the activity based on the amounts specified in the IDIS Funding path.

#### Section 108 Loan Guarantee

2. Enter the amount of funds coming from section 108 loans to fund this activity.

(Leave the field blank if not applicable.)

#### Other Consolidated Plan Funds: HOME

3. Enter the amount of funds from HOME grant money used to fund this activity.

(Leave the field blank if not applicable.)

#### Other Consolidated Plan Funds: ESG

4. Enter the amount of funds from ESG grant money used to fund this activity.

(Leave the field blank if not applicable.)

#### Other Consolidated Plan Funds: HOPWA

5. Enter the amount of funds from ESG grant money used to fund this activity.

(Leave the field blank if not applicable.)

#### Subtotal of HUD funds

6. Once you save or validate the data on this screen, the system will calculate the total of all HUD funds reported on this screen and display the total amount in this field.

#### Appalachian Regional Commission

7. Enter the amount of funds from Appalachian Regional Commission used to fund this activity.

(Leave the field blank if not applicable.)

#### Other Federal Funds

8. Enter the amount of any other federal funds used to fund this activity.

(Leave the field blank if not applicable.)

- |                          |  |
|--------------------------|--|
| <b>State/Local Funds</b> | <p>9. Enter the amount of any state and/or local funds used to fund this activity.</p> <p>(Leave the field blank if not applicable.)</p>   |
| <b>Private Funds</b>     | <p>10. Enter the amount of any private funds used to fund this activity.</p> <p>(Leave the field blank if not applicable.)</p>   |
| <b>Other</b>             | <p>11. Enter the amount of any other funds used to fund this activity.</p> <p>(Leave the field blank if not applicable.)</p>   |
| <b>Total</b>             | <p>12. Once you save or validate the data on this screen, the system will calculate the total of all funds reported on this screen and display the total amount in this field.</p> |

```
MM/DD/YY   HH:MM                               FUNDING SOURCES                                CDBG02

Grantee Activity ID xxxxxxxxxxxxxxxxxxxxxxxx          IDIS Activity ID zzzzzzz9
Activity Name      xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Natl/Obj xxxxx

1. CDBG Funds                                           $999,999,999.99
2. Section 108 Loan Guarantee                         _____
3. Other Consolidated HOME _____
   Plan Funds     ESG _____
                  HOPWA _____ $999,999,999.99
4. Appalachian Regional Commission                    _____
5. Other Federal Funds                               _____
6. State/Local Funds                                 _____
7. Private Funds                                     _____
8. Other       _____                             _____

Total $999,999,999.99

Leveraging Ratio (CDBG+108 : all other funds): 999:999

F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE
```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
IDIS Activity ID		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Natl/Obj		Carried forward from the CDBG NATIONAL OBJECTIVE Screen (CDBG01).	Protected field

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
CDBG Funds		The total amount of CDBG funds funding the activity will be displayed here.  <b>NOTE:</b> This amount is the total of all CDBG funds as reported in the IDIS Funding Path including "PI".	Protected field
Section 108 Loan Guarantee		Enter the amount of funds coming from section 108 loans to fund this activity.	Enter amount or leave blank
Other Consolidated Funds: HOME		Enter the amount of funds from HOME grant money used to fund this activity.	Enter amount or leave blank
Other Consolidated Funds: ESG		Enter the amount of funds from ESG grant money used to fund this activity.	Enter amount or leave blank
Other Consolidated Funds: HOPWA		Enter the amount of funds from HOPWA grant money used to fund this activity.	Enter amount or leave blank
Subtotal of HUD Funds		The system will calculate the total of all HUD funds: CDBG, Section 108, HOME, ESG, and HOPWA and display the total in this field.	Protected field
Appalachian Regional Commission		Enter the amount of funds from Appalachian Regional Commission used to fund this activity.	Enter amount or leave blank
Other Federal Funds		Enter the amount of any other federal funds used to fund this activity.	Enter amount or leave blank
State/Local Funds		Enter the amount of any state and/or local funds used to fund this activity.	Enter amount or leave blank
Private Funds		Enter the amount of any private funds used to fund this activity.	Enter amount or leave blank
Other		Enter the amount of any other funds used to fund this activity.	Enter amount or leave blank
Total Funds		This field will be calculated by the system. It will reflect the sum of all funds used to fund the activity as reported on this screen	Protected field
Leveraging Ratio		This field will be calculated by the system. It will reflect the ratio of the total of CDBG + Section 108 funds to the total of all other funds.	Protected field

## 8.5.2 Entering Organization Carrying Out Data (CDBG03 and CDBG04)

**SCREEN:**                      **Organization Carrying Out Activity screen**                      **(CDBG03)**

**PURPOSE:** On this screen you identify the type of organization carrying out the activity. Activities being carried out by States and Puerto Rico will see different selections than will Entitlements and Insular Areas. Depending on your response you may be required to enter subsequent information on the CDBG04 screen to identify additional information about the entity carrying out the activity.

---

### How To Complete This Screen:



Answer the questions on the screen with responses that apply to your activity.

When you have completed the fields on this screen, press **<Enter>** to go to the next screen in the path.

### For Entitlement and Insular Areas:

**Is this activity being carried out by the Grantee (Y/N)?**

1. For new activities, the screen will display with a default of "Y" in this field. Change to "N", if the default does not apply.

If "Y", place an "X" next to the appropriate category:  
Grantee employees, Contractors, or Grantee employees and contractors.

If "N", place an "X" next to the appropriate category:  
A subrecipient only, Another unit of local government, Another public agency, A CBDO only, A CBDO designated as a subrecipient.

**If Yes: Enter "X" by the appropriate category:**

2. You must select one (and only one) category that applies if you answered "Y" to the first question on the screen.

(Leave the field blank if not applicable.)

**If No: Enter organization name**

3. You must enter the name of the organization carrying out the activity if you responded "N" to the first question on the screen.

(Leave the field blank if not applicable.)

**If No: Activity is being carried out by**

4. You must select one (and only one) category that applies if you answered "N" to the first question on the screen.

(Leave the field blank if not applicable.)





4. You must select one (and only one) category that applies if you answered “N” to the first question on the screen.  
(Leave the field blank if not applicable.)

**Subrecipient is:**

1. Enter "X" by one (and only one) designation:

Non-profit organization

For-profit authorized under 570.201(o)

**Enter “X” by all that apply:**

2. Enter "X" by all that apply:

A faith-based organization

An institution of higher education

(Leave the field blank if not applicable.)

```
MM/DD/YY  HH:MM          CDBG ACTIVITY: SUBRECIPIENT QUESTIONS          CDBG04

Grantee Activity ID xxxxxxxxxxxxxxxxxxxx          IDIS Activity ID zzzzzzz9
Activity Name          xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Natl/Obj xxxxx

Enter "X" by the appropriate designation:
  Subrecipient is:
    _ Non-profit organization
    OR
    _ For-profit authorized under 570.201(o)

Enter "X" by all that apply:
  Subrecipient is:
    _ A faith-based organization
    _ An institution of higher education

(This line reserved for messages)

F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
```

**CBDO is:**

- For-profit entity

**CBDO is:**

- (Leave the field blank if not applicable.)

**States:**

**Enter "X" by the  
appropriate designation:**

**105(a)(15) entity is:**

1. Enter "X" by one (and only one) designation:

Non-profit organization

For-profit entity

**Enter "X" by all that  
apply:**

**105(a)(15) is:**

2. Enter "X" by all that apply:

A faith-based organization

An institution of higher education

(Leave the field blank if not applicable.)

12/30/05 11:14 CDBG Activity Carried Out by 105(a)(15) Entity CDBG04

Grantee Activity ID

IDIS Activity ID 1659

Activity Name TEST STATE REG CIT

Natl/Obj LMA

Enter "X" by the appropriate designation:

105(a)(15) Entity is:

☒ Non-profit organization

OR

☐ For-profit entity

Enter "X" by all that apply:

105(a)(15) Entity is:

☐ A faith-based organization

☐ An institution of higher education

F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE

### 8.5.3 Entering Form of Assistance Data (CDBG05)

**SCREEN:** Form of Assistance screen **(CDBG05)**

**PURPOSE:** On this screen you identify information pertaining to any loan assistance provided for the activity.

---

#### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.) Amounts should be entered in dollars and cents. (Example: \$1050.50 would be entered 1050.50. \$2000.00 would be entered as 2000.00)

When you have completed the fields on this screen, press **<Enter>** to go to the next screen in the path.

#### # Grants

1. Specify the number of grants used to provide assistance to this activity.

(Leave the field blank if not applicable.)

#### # Loans

2. Specify the number of loans used to provide assistance to this activity.

(Leave the field blank if not applicable.)

#### Amortized Loan<sup>1</sup>

3. If CDBG assistance for the activity is provided in the form of a loan, enter the following information.

Interest Rate    Type the interest rate for the loan.

Amortization Period

Type the amortization period, in months, for repayment of the loan.

Amount    Type the dollar amount of the loan provided by the CDBG program to the entity.

#### Deferred Payment/Forgivable Loan<sup>1</sup>

4. If the payment on the loan is deferred, enter the following information.

Interest Rate    Type the interest rate for the deferred payment.

Amortization Period

Type the amortization period, in months, for repayment of the deferred loan, if appropriate.

Amount

Type the dollar amount of the deferred payment loan provided by the CDBG program to the entity.

---

<sup>1</sup> If more than one loan, enter the average interest rate, average amortization period, and the total dollar amount of loans made.



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Amortized Loans		Enter the Interest Rate, Amortization Period in months, and Amount for CDBG Loans. (If more than one loan, enter average interest rate, average amount, period (in months), and the total dollar amount of loans made.)	Int=4 numeric chars Amort=3 numeric chars Amount=\$nnnnnnnnnn
Deferred Payment/ Forgivable Loans		Enter the Interest Rate, Amortization Period in months, and Amount for any CDBG Deferred Payment.	Int=4 numeric chars Amort=3 numeric chars Amount=\$nnnnnnnnnn
Press <Enter> to save the information and move to the next screen in the CDBG path.			

## 8.5.4 Entering CDBG Activity Information (CDBG06)

SCREEN:	CDBG Activity Information	(CDBG06)
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### How To Complete This Screen:



#### One-for-One Replacement

Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <Enter> to go to the next screen in the completion path.

1. Type **X** if this activity is a One-for-One replacement activity. This means the activity being assisted results in the conversion or demolition of one or more dwelling units that must be replaced.

If you type **X** here, the system will automatically display the One-for-One Replacement Screen (CDBG16) as part of the CDBG completion path.

(Leave the field blank if not applicable.)

#### Special Assessment

2. Type **X** if this is a public improvement activity for which a special assessment will be levied.

(Leave the field blank if not applicable.)

#### Displacement

3. Type **X** if this is a displacement activity, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of a CDBG-assisted rehabilitation, demolition, or acquisition activity.

If you type **X** here, the system will automatically display the Displacement Screen (CDBG15) as part of the CDBG completion path.

(Leave the field blank if not applicable.)

#### Revolving Fund

4. Type **X** if this activity is funded through a revolving fund with a set of accounts that are independent of other program accounts.

(You established this account so that you could carry out specific activities that would generate payments to the fund to carry out the same type of activities.)

(Leave the field blank if not applicable.)



**Float Funded**

5. Type **X** if this activity is float funded. Float funding is a financing technique under which an eligible activity is carried out using CDBG funds that were also programmed for one or more other activities at the time the funds were committed to the new activity.

This technique is based on the premise that some activities do not require funds immediately and that a recipient's unexpended CDBG funds will contain a balance (the *float*) that can be used on a temporary basis to fund other activities. Activities financed with float loans must generate a sufficient level of program income within an established time frame to enable the grantee to carry out the activities that were initially programmed.

**Favored Activity**

6. Type **X** if this activity a *Favored Activity*, that is an economic development activity with a matrix code of 18A or 18B that is of important national interest and therefore may be excluded from the aggregate public benefit calculation. (Ref. 24 CFR 570.209(b)(2)).

(Leave the field blank if not applicable.)

**Colonia**

7. Type **X** if this activity is located within a community outside a metropolitan area with a population exceeding one million, that is within 150 miles of the U.S. – Mexico border in AZ, CA, NM and TX and lacks adequate infrastructure and decent, safe and sanitary housing.

**Brownfield**

8. Type **X** if this activity is located in an area designated as a brownfield redevelopment area. A brownfield is an abandoned, idled, or underused property where expansion or redevelopment is complicated by the presence or potential presence of environmental contamination.

**Funds to be Received**

9. If you indicate that this is a Float Funded activity, you must enter the date the Funds To Be Received (that is, the date the repayment is expected to be made) and the Float Principal Balance.

(Leave the field blank if not applicable.)

**Float Principal Balance**

10. If this is a float funded activity, type the Float Fund Principal Balance.

**Indicate if activity is located in a Strategy, CDFI, or Local Target Area (S/C/L)**

13. If the activity is located in a Community Development Financial Institution (CDFI) Area or a Neighborhood Revitalization Strategy Area, enter **C** for CDFI Area or **S** for Neighborhood Revitalization Strategy Area, and then enter the Area Identifier in the next field. If the activity is located in a Local Target Area, enter **L** but do not enter an Area Identifier at this time.

**NOTE:** If these two fields do not apply to your jurisdiction, leave them blank.

Effective with Version 6.7, the following entries are required.\*\*

For activities with an NOC of LMHSP, you must enter **C** or **S** into this field and an area identifier in the next field.

For activities with an NOC of LMAFI, you must enter **C** into this field and an area identifier in the next field.

For activities with an NOC of LMASA, you must enter **S** into this field and an area identifier in the next field.

**Area Identifier**

14. If you entered **S** or **C** in the previous field, type the Area Identifier for the Neighborhood Revitalization Strategy Area or CDFI Area in which the activity is located.

**NOTE:** if you do not know the ID of the Area Identifier for a CDBG CDFI or NRSA Area, press F1. If a list of identifiers already exists, IDIS will display it. Otherwise, you will be prompted to add a new identifier. (To use this feature, you must have IDIS permission to use the Table Maintenance features; contact your IDIS administrator for assistance.)

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\*\* These requirements do not apply to: 1) Activities with a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Special Assessment		Is this a public improvement activity for which a special assessment will be levied?	X or blank
Displacement		<p>Does this activity involve a displacement activity, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of a CDBG-assisted rehabilitation, demolition, or acquisition activity?</p> <p><b>NOTE:</b> If you type an <b>X</b> here, the system will automatically generate the Displacement Screen (CDBG15) as part of the CDBG completion path.</p>	X or blank
Revolving Fund		<p>Is this activity funded through a revolving fund with a set of accounts that are independent of other program accounts?</p> <p>(You established this account so that you could carry out specific activities that would generate payments to the fund to carry out the same types of activities.)</p>	X or blank
Float Funded		<p>Is this a float funded activity?</p> <p>Float funding is a financing technique under which an eligible activity is carried out using CDBG funds that were also programmed for one or more other activities at the time the funds were committed to the new activity.</p> <p>This technique is based on the premise that some activities do not require funds immediately and that a recipient's unexpended CDBG funds will contain a balance (the <i>float</i>) that can be used on a temporary basis to fund other activities. Activities financed with float loans must generate a sufficient level of program income within an established time frame to enable the grantee to carry out the activities that were initially programmed.</p> <p><b>NOTE:</b> If you indicate that this is a Float Funded activity, you <b>must</b> enter data into the fields: Funds To Be Received and Float Principal Balance.</p>	X or blank
Favored Activity		Type <b>X</b> if this activity a <i>Favored Activity</i> , that is an economic development activity with a matrix code of 18A or 18B that is of important national interest and therefore may be excluded from the aggregate public benefit calculation. (Ref. 24 CFR 570.209(b)(2)).	X or blank

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Colonia Activity		Type <b>X</b> if this activity is located within a community outside a metropolitan area with a population exceeding one million, that is within 150 miles of the U.S. – Mexico border in AZ, CA, NM and TX and lacks adequate infrastructure and decent, safe and sanitary housing.	X or blank
Brownfield		Type <b>X</b> if this activity is located in an area designated as a brownfield redevelopment area. A brownfield is an abandoned, idled, or underused property where expansion or redevelopment is complicated by the presence or potential presence of environmental contamination.	X or blank
Float Principal Balance	Only if Float Funded = X	If this is a float funded activity, type the Float Fund Principal Balance.	\$nnnnnnnnnn
Indicate If The Activity Is Located in a Neighborhood Revitalization Strategy Area, CDFI Area, or Local Target Area: (S/C/L)		<p>If the activity is located in a Community Development Financial Institution (CDFI) Area or a Neighborhood Revitalization Strategy Area, enter <b>C</b> for CDFI Area or <b>S</b> for Neighborhood Revitalization Strategy Area, and then enter the Area Identifier in the next field. If the activity is located in a Local Target Area, enter <b>L</b>. You do not need to enter an Area ID for Local Target Area activities. If these two fields do not apply to your jurisdiction, leave them blank.</p> <p>Effective with Version 6.7, the following entries are required.*</p> <p>For activities with an NOC of LMHSP, you must enter <b>C</b> or <b>S</b> into this field and an area identifier in the next field.</p> <p>For activities with an NOC of LMAFI, you must enter <b>C</b> into this field and an area identifier in the next field.</p> <p>For activities with an NOC of LMASA, you must enter <b>S</b> into this field and an area identifier in the next field.</p>	<p>S = NRSA Area</p> <p>C = CDFI Area</p> <p>L = Local Target Area</p>
Area Identifier	✓ (Only if C or S in Previous	If you entered <b>C</b> or <b>S</b> in the previous field, type the Area Identifier for the CDFI Area or Neighborhood Revitalization Strategy Area in which the activity is located.	2 numeric characters

\* These requirements do not apply to: 1) Activities with a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
	Field)	<b>NOTE:</b> if you do not know the ID of the Area Identifier for a CDBG CDFI or NRSA Area, press <F1>. If a list of identifiers already exists, IDIS will display it. Otherwise, you will be prompted to add a new identifier. (To use this feature, you must have IDIS permission to use the Table Maintenance features; contact your IDIS administrator for assistance.)	
Press <Enter> to save the information and move to the next screen in the CDBG path.			

## 8.5.5 Entering Area Benefit Data (CDBG07)

**SCREEN:** Area Benefit Data screen **(CDBG07)**

**PURPOSE:** On this screen you identify the % of low/mod in the service area and the census tracts (or block groups within a census tract) that are associated with this activity's service area. Enter each Census tract on a separate line.

If the service area includes entire Census tracts, *do not* list the individual block groups within such tracts. If the service area contains less than the total Census tract, you must enter the block groups covered by the service area.



**Note:** You must enter at least one County Code/Census combination before you can save this screen. Refer to this [web page](#) for guidance from the CDBG program office on completing this screen.

### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <Enter> to save the data and return to the CDBG NATIONAL OBJECTIVE (CDBG01) for Entitlements or to go to the Direct Benefit Data Screen (CDBG08) for States.

**Census or Survey\* Data Used (C/S)**

1. Type one of the following to indicate if a survey or Census data was used to determine the low/moderate income persons residing in the area. (Note: HUD must approve all surveys you plan to undertake.)

**C** Census data was used.

**S** Survey was used.

**Total # of Low/Mod in Service Area**

2. For data entered prior to release 9.0 this field is not enterable. For Entitlement activities where Census data is used, the system will calculate this field. For Survey activities or activities carried out by State grantees, enter the total # of low/mods in the service area.

**Total Low/Mod Universe Population in Service Area**

3. For data entered prior to release 9.0 this field is not enterable. Entitlement activities where Census data is used, the system will calculate this field. For Survey activities or activities carried out by State grantees, enter the total # of respondents for the survey area.

**% of Low/Mod in Service Area**

4. For Entitlement activities where Census data is used, the system will calculate this field. For data entered prior to release 9.0, for Survey activities or activities carried out by State grantees, type the percentage of low and moderate-income persons residing in the service area.

<b>LMISD Data</b>	5. For display only. The system populates this date for Entitlement activities where Census data is used. A literal is also displayed to show whether capped or uncapped data was used for the calculation.
<b>County Code</b>	6. Enter the FIPS county code corresponding to the service area.
<b>Census Tract</b>	7. Type the corresponding Census tract(s) for the LMA service area.
<b>Block Groups</b>	8. If the service area contains less than the total Census tract, type the block group(s) within the associated Census tract. <sup>1</sup>
<b>Use Capped or Uncapped data (C/U)?</b>	9. This question will only appear For Entitlement activities where Census data is used, and then, only if the grantee is one that has the option to use "capped" or "uncapped" low/mod data for calculating the % low/mod. At the beginning of the grantee's reporting year, grantees that have this option will be required to make the selection for which set of data to use for calculating % low/mod for area benefit activities for the upcoming year. <sup>2</sup>
<b>Recalculate Percentage (Y/N)?</b>	10. This question will only appear For Entitlement activities where Census data is used. The user may enter a 'Y' in this field if recalculation is desired without changing any census tract data <sup>3,4</sup> .
<b>Additional Entries (Y/N)?</b> —	10. If you need additional lines to enter the county code/census tract/block groups that apply to this activity, enter "Y". The system will display additional lines for entry purposes <sup>5</sup> .

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<sup>1</sup> Do not enter individual blocks. Only block groups here.

<sup>2</sup> This question shares its space with "Recalculate Percentage (Y/N)?", they are mutually exclusive.

<sup>3</sup> This question shares its space with "Use Capped or Uncapped data (C/U)?", they are mutually exclusive.

<sup>4</sup> Modifying or entering new census tract data automatically triggers a recalculation.

<sup>5</sup> If additional lines are still available to enter data the program will reposition to the last page otherwise a new page of blank entries will be presented. If the user is already on the last page and there are unused lines on that page, putting a 'Y' in this option has no effect.





DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Total Low/Mod Universe Population in Service Area	✓ <sup>1</sup>	The total number of Low/Mod universe population in the Service Area.	999999
% Of Low/Mod in Service Area	✓ <sup>2</sup>	What is the percentage of low/mod persons in the service area? This percentage will be calculated by the system for data entered after release 9.0.	999.9
County Code	✓ <sup>3</sup>	What is the county code for the area assisted by the activity?	999
Census Tract	✓ <sup>4</sup>	What are the Census tract(s) for the LMA service area?	9999.99
Block Groups		If the service area contains less than the total Census tract, what are the block group(s) within the associated Census tract?	2 numeric characters ID blocks per Census Tract
Press <Enter> to save the information and return to the Setup Activity Screen (C04MA08).			

<sup>1</sup> When entered, the calculation of “% Of Low/Mod in service Area” depends on this value. The “% Of Low/Mod in service Area” must be 51% or above (or meet or exceed the exception %) to fund the activity.

<sup>2</sup> When entered, must be 51% or above (or meet or exceed the exception %) to fund the activity.

<sup>3</sup> For Entitlement activities where Census data is used, the value in this field is validated against the LMISD data for the grantee.

<sup>4</sup> This field must be in the specified format when entered. For Entitlement activities where Census data is used the value entered in this field is validated against the LMISD data for the grantee. You must enter at least one census tract/survey line of data. To delete a census tract/survey line, delete the census tract and press F3, F9, or ENTER depending upon the desired action.

## 8.6 The CDBG LMC Path Screens

When you select a National Objective Code of LMC, LMCMC, or LMCSV on the CDBG NATIONAL OBJECTIVE Screen (CDBG01), the system displays this series of screens.

Entitlement Grantees	State Grantees
*Funding Sources (CDBG02) <i>See Section 8.5.1</i>	*Funding Sources (CDBG02) <i>See Section 8.5.1</i>
*Organization carrying out activity (CDBG03) <i>See Section 8.5.2</i>	*Organization carrying out activity (CDBG03) <i>See Section 8.5.2</i>
*Subrecipient/CBDO Screen (CDBG04) <i>See Section 8.5.2</i>	*Organization Carrying Out Activity - Cont. (CDBG04) <i>See Section 8.5.2</i>
*Form of Assistance (CDBG05) <i>See Section 8.5.3</i>	*Form of Assistance (CDBG05) <i>See Section 8.5.3</i>
CDBG Activity Screen (CDBG06)	CDBG Activity Screen (CDBG06)
If Nature/Location = Y, Nature/Location Screen (CDBG10)	If Nature/Location = Y, Nature/Location Screen (CDBG10)
CDBG Direct Benefit Data (CDBG08)	CDBG Direct Benefit Data Screen (CDBG08)
CDBG Beneficiary Income Levels (CDBG13)	CDBG Beneficiary Income Levels Screen (CDBG13)
*If Matrix Code 18a or 18b, Job Creation/Retention Screen (CDBG11) <i>See Section 8.8.4</i>	*If Matrix Code 18a or 18b, Job Creation/Retention Screen (CDBG11) <i>See Section 8.8.4</i>
*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>	*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>
*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>	*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>

(Screens with an \* are used by more than one NOC and are described elsewhere in this chapter.)

## 8.6.1 Entering CDBG Activity Information (CDBG06)

SCREEN:	CDBG Activity Information	(CDBG06)
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### How To Complete This Screen:



#### One-for-One Replacement

Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <Enter> to go to the next screen in the completion path.

1. Type **X** if this activity is a One-for-One replacement activity. This means the activity being assisted results in the conversion or demolition of one or more dwelling units that must be replaced.

If you type **X** here, the system will automatically display the One-for-One Replacement Screen (CDBG16) as part of the CDBG completion path.

(Leave the field blank if not applicable.)

#### Special Assessment

2. Type **X** if this is a public improvement activity for which a special assessment will be levied.

(Leave the field blank if not applicable.)

#### Displacement

3. Type **X** if this is a displacement activity, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of a CDBG-assisted rehabilitation, demolition, or acquisition activity.

If you type **X** here, the system will automatically display the Displacement Screen (CDBG15) as part of the CDBG completion path.

(Leave the field blank if not applicable.)

#### Revolving Fund

4. Type **X** if this activity is funded through a revolving fund with a set of accounts that are independent of other program accounts.

(You established this account so that you could carry out specific activities that would generate payments to the fund to carry out the same type of activities.)

(Leave the field blank if not applicable.)

**Float Funded**

5. Type **X** if this activity is float funded. Float funding is a financing technique under which an eligible activity is carried out using CDBG funds that were also programmed for one or more other activities at the time the funds were committed to the new activity.

This technique is based on the premise that some activities do not require funds immediately and that a recipient's unexpended CDBG funds will contain a balance (the *float*) that can be used on a temporary basis to fund other activities. Activities financed with float loans must generate a sufficient level of program income within an established time frame to enable the grantee to carry out the activities that were initially programmed.

**Favored Activity**

6. Type **X** if this activity a *Favored Activity*, that is an economic development activity with a matrix code of 18A or 18B that is of important national interest and therefore may be excluded from the aggregate public benefit calculation. (Ref. 24 CFR 570.209(b)(2)).

(Leave the field blank if not applicable.)

**Colonia**

7. Type **X** if this activity is located within a community outside a metropolitan area with a population exceeding one million, that is within 150 miles of the U.S. – Mexico border in AZ, CA, NM and TX and lacks adequate infrastructure and decent, safe and sanitary housing.

**Brownfield**

8. Type **X** if this activity is located in an area designated as a brownfield redevelopment area. A brownfield is an abandoned, idled, or underused property where expansion or redevelopment is complicated by the presence or potential presence of environmental contamination.

**Funds to be Received**

9. If you indicate that this is a Float Funded activity, you must enter the date the Funds To Be Received (that is, the date the repayment is expected to be made) and the Float Principal Balance.

(Leave the field blank if not applicable.)

**Float Principal Balance**

10. If this is a float funded activity, type the Float Fund Principal Balance.

**Indicate if activity is located in a Strategy, CDFI, or Local Target Area (S/C/L)**

11. If the activity is located in a Community Development Financial Institution (CDFI) Area or a Neighborhood Revitalization Strategy Area, enter **C** for CDFI Area or **S** for Neighborhood Revitalization Strategy Area, and then enter the Area Identifier in the next field. If the activity is located in a Local Target Area, enter **L** but do not enter an Area Identifier.

**NOTE:** If these two fields do not apply to your jurisdiction, leave them blank.

Effective with Version 6.7, the following entries are required.\*\*

For activities with an NOC of LMHSP, you must enter **C** or **S** into this field and an area identifier in the next field.

For activities with an NOC of LMAFI, you must enter **C** into this field and an area identifier in the next field.

For activities with an NOC of LMASA, you must enter **S** into this field and an area identifier in the next field.

**Area Identifier**

12. If you entered **S** or **C** in the previous field, type the Area Identifier for the Neighborhood Revitalization Strategy Area or CDFI Area in which the activity is located.

**NOTE:** if you do not know the ID of the Area Identifier for a CDBG CDFI or NRSA Area, press F1. If a list of identifiers already exists, IDIS will display it. Otherwise, you will be prompted to add a new identifier. (To use this feature, you must have IDIS permission to use the Table Maintenance features; contact your IDIS administrator for assistance.)

**Presumed Benefit**

13. This field only appears on the screen if the activity has a NOC of LMC\*. A **Y** answer indicates a Limited Clientele Presumed Benefit activity designed to exclusively serve a category of persons presumed by HUD to be of low/moderate income. (Presumed benefit groups are limited to: abused children, battered spouses, elderly persons, adults meeting the Census definition of severely disabled, illiterate adults, persons living with AIDS, homeless, and migrant farm workers.)

**Nature/Location**

14. A **Y** answer indicates a Limited Clientele Nature/Location activity that would be considered low/moderate as a result of the nature of the activity and the place it is being carried out.

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\*\* These requirements do not apply to: 1) Activities with a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
IDIS Activity ID		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Natl/Obj		Carried forward from the CDBG NATIONAL OBJECTIVE Screen (CDBG01).	Protected field
CDBG Objective Citation		System generated based on the National Objective Code you entered.	Protected field
One-for-One Replacement		<p>Is this activity a One-for-One replacement activity? The activity being assisted results in the conversion or demolition of one or more dwelling units that must be replaced.</p> <p><b>NOTE:</b> If you type an <b>X</b>, the system will automatically generate the One-for-One Replacement Screen (CDBG06) as part of the CDBG completion path.</p>	X or blank
Special Assessment		Is this a public improvement activity for which a special assessment will be levied?	X or blank
Displacement		<p>Does this activity involve a displacement activity, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of a CDBG-assisted rehabilitation, demolition, or acquisition activity?</p> <p><b>NOTE:</b> If you type an <b>X</b> here, the system will automatically generate the Displacement Screen (CDBG06) as part of the CDBG completion path.</p>	X or blank
Revolving Fund		<p>Is this activity funded through a revolving fund with a set of accounts that are independent of other program accounts?</p> <p>(You established this account so that you could carry out specific activities that would generate payments to the fund to carry out the same types of activities.)</p>	X or blank
Float Funded		<p>Is this a float funded activity?</p> <p>Float funding is a financing technique under which an eligible activity is carried out using CDBG funds that were also programmed for one or more other activities</p>	X or blank



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		<p>at the time the funds were committed to the new activity.</p> <p>This technique is based on the premise that some activities do not require funds immediately and that a recipient's unexpended CDBG funds will contain a balance (the <i>float</i>) that can be used on a temporary basis to fund other activities. Activities financed with float loans must generate a sufficient level of program income within an established time frame to enable the grantee to carry out the activities that were initially programmed.</p> <p><b>NOTE:</b> If you indicate that this is a Float Funded activity, you <b><i>must</i></b> enter data into the fields: Funds To Be Received and Float Principal Balance.</p>	
Favored Activity		Type <b>X</b> if this activity a <i>Favored Activity</i> , that is an economic development activity with a matrix code of 18A or 18B that is of important national interest and therefore may be excluded from the aggregate public benefit calculation. (Ref. 24 CFR 570.209(b)(2)).	X or blank
Colonia Activity		Type <b>X</b> if this activity is located within a community outside a metropolitan area with a population exceeding one million, that is within 150 miles of the U.S. – Mexico border in AZ, CA, NM and TX and lacks adequate infrastructure and decent, safe and sanitary housing.	X or blank
Brownfield		Type <b>X</b> if this activity is located in an area designated as a brownfield redevelopment area. A brownfield is an abandoned, idled, or underused property where expansion or redevelopment is complicated by the presence or potential presence of environmental contamination.	X or blank
Funds To Be Received	Only if Float Funded = X	If this is a float funded activity, type the date you expect the repayment to be made.	mm/dd/yyyy

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Float Principal Balance	Only if Float Funded = X	If this is a float funded activity, type the Float Fund Principal Balance.	\$nnnnnnnnnn
Indicate If The Activity Is Located in a Neighborhood Revitalization Strategy Area, CDFI Area, or Local Target Area: (S/C/L)		<p>If the activity is located in a Community Development Financial Institution (CDFI) Area or a Neighborhood Revitalization Strategy Area, enter <b>C</b> for CDFI Area or <b>S</b> for Neighborhood Revitalization Strategy Area, and then enter the Area Identifier in the next field. If the activity is located in a Local Target Area, enter <b>L</b>. You do not need to enter an Area ID for Local Target Area activities. If these two fields do not apply to your jurisdiction, leave them blank.</p> <p>Effective with Version 6.7, the following entries are required.*</p> <p>For activities with an NOC of LMHSP, you must enter <b>C</b> or <b>S</b> into this field and an area identifier in the next field.</p> <p>For activities with an NOC of LMAFI, you must enter <b>C</b> into this field and an area identifier in the next field.</p> <p>For activities with an NOC of LMASA, you must enter <b>S</b> into this field and an area identifier in the next field.</p>	<p>S = NRSA Area</p> <p>C = CDFI Area</p> <p>L = Local Target Area</p>
Area Identifier	✓ (Only if C or S in Previous Field)	<p>If you entered <b>C</b> or <b>S</b> in the previous field, type the Area Identifier for the CDFI Area or Neighborhood Revitalization Strategy Area in which the activity is located.</p> <p><b>NOTE:</b> if you do not know the ID of the Area Identifier for a CDBG CDFI or NRSA Area, press &lt;F1&gt;. If a list of identifiers already exists, IDIS will display it. Otherwise, you will be prompted to add a new identifier. (To use this feature, you must have IDIS permission to use the Table Maintenance features; contact your IDIS administrator for assistance.)</p>	2 numeric characters

\* These requirements do not apply to: 1) Activities with a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Presumed Benefit		A <b>Y</b> answer indicates a Limited Clientele Presumed Benefit activity designed to exclusively serve a category of persons presumed by HUD to be of low/moderate income. (Presumed benefit groups are limited to: abused children, battered spouses, elderly persons, adults meeting the Census definition of severely disabled, illiterate adults, persons living with AIDS, homeless, and migrant farm workers.)	Y, N or blank
Nature/Location		A <b>Y</b> answer indicates a Limited Clientele Nature/Location activity that would be considered low/moderate as a result of the nature of the activity and the place it is being carried out.	Y, N or blank
		<p>If you answer Y that the nature/location of this activity benefits low/mod, you will be required to enter a description on the Nature/Location screen (CDBG10) of how the nature/location qualifies it as benefiting low/mod clientele.*</p> <p><b>N/N</b> entered into these fields indicates that the beneficiaries are not presumed to be low/moderate income and the nature/location of the activity is not such that it may be concluded to benefit low mod. Therefore, presumed benefit and nature/location do not apply to this activity. (The <b>Y/Y</b> combination is invalid.)</p>	
Press <Enter> to save the information and move to the next screen in the CDBG path.			

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\* This requirement does not apply to: 1) Activities with a national objective code of LMC\* and a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
IDIS Activity ID		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Natl/Obj		Carried forward from the CDBG Activity Information Screen (CDBG06)	Protected field
Nature/Location Narrative	✓*	Describe how the nature or location of this activity benefits low/mod persons.	840 alphanumeric characters
Press <Enter> to save the information and display the CDBG Direct Benefit Data screen (CDBG08).			

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\* This requirement does not apply to: 1) Activities with a national objective code of LMC\* and a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.

### 8.6.3 Entering Direct Benefit Data (CDBG08)

**SCREEN:** Direct Benefit screen **(CDBG08)**

**PURPOSE:** For LMC\* activities, you enter the count of *persons* directly benefiting from the CDBG activity as well as their racial and ethnic breakdown. There are four different variations of this screen for 'LMC\*' activities (each variation is shown). It will look different depending on whether the data was entered prior to release 9.0 or entered "by year" post release 9.0. Additionally, in some cases you can choose whether the data will be entered by persons or by households. When this is an option, the selection of households/persons can be made by pressing the F15 key. You will not always have the choice to do so. It depends on what setup data is present. All of the fields are explained here although you may or may not see them depending on whether the data was entered before or after release 9.0. If the matrix code for the activity is: '04', '08', '05R', '05S', '05T', OR '14H' you will have the option to switch to households, otherwise you must enter the data by persons. See this [web page](#) for guidance from the CDBG Program Office on completing this screen.

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#### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <Enter> to go to the next screen in the completion path.

---

**Program year:**

1. This will only display when you have entered an 'I' in the "Insert/Delete program year(I/D)?" question, or when there is no data present, as in when you first enter an activity. Type the year to be inserted and press enter.

**Note:** This field, and the next two fields described are mutually exclusive, so they are displayed on the same line, in the same place at different times depending on when they're needed.

**Totals for program year:**

2. Display only: This will only display for converted or new data. Data entered prior to release 9.0 that has not been converted will display the field below instead. Beginning with release 9.0, direct benefit data should be reported on an annual basis. The program year for which data is being reported is displayed here.

**Totals as of yyyy/mm/dd**

3. Display only: For activities where benefit data was entered prior to release 9.0, the system will display the total counts previously entered. Those counts will be considered to be cumulative through the date of release 9.0.

**Race**

4. Type the race code of the counts to be entered on this line. Report the number of persons/households served by the following groups for all direct benefit activities where you maintain a personal record. If you don't maintain a personal record, provide the information from a spot survey or an estimate of persons using the facility or service.

Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.

**RACE, cont'd**

Effective with Version 7.0, Hispanic will be an ethnicity category within IDIS that cuts across all races. Those who are White, Black, Asian, Pacific Islander, American Indian, or Other Multi-Racial may also be counted as being Hispanic.

Race Codes are available using the F1 key on this field.

Valid race codes are as follows:

11. White. A person having origins in any of the original peoples of Europe, North Africa or the Middle East.
12. Black or African American. A person having origins in any of the black racial groups of Africa. Terms such as "Haitian" or "Negro" can be used in addition to "Black or African American."
13. Asian. A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand and Vietnam.
14. American Indian or Alaska Native. A person having origins in any of the original peoples of North and South America (including Central America), and who maintains affiliation or community attachment.
15. Native Hawaiian or Other Pacific Islander. A person having origins in any of the original people of Hawaii, Guam, Samoa or other Pacific Islands.
16. American Indian or Alaska Native & White. A person having these multiple race heritages as defined above.
17. Asian & White. A person having these multiple race heritages as defined above.
18. Black or African American & White. A person having these multiple race heritages as defined above.
19. American Indian or Alaska Native & Black or African American. A person having these multiple race heritages as defined above.

Other Multi Racial. For reporting individual responses that are not included in any of the other categories listed above.

**Totals for “All” and  
“Hispanic” / Owner/Renter**

5. These columns will vary in title and numbers depending on whether the data is converted or unconverted. Also, the column headers will look different depending on whether the counts are by Households or by Persons. All of the fields in this group are numeric.

**Note:** Although these fields are optional, they constitute the total beneficiary count. So some values must be entered or you will not be able to complete the activity.

**Insert/Delete program  
year(I/D)?**

6. If you need to enter a new year of benefit data, type “I” in this field. A clean screen will be presented where you will enter the new year and appropriate counts.

To delete a previously entered year's data, type “D” in this field. The data for the year displayed on the screen will be deleted.

**Display cumulative  
totals(Y/N)?**

7. This will display only when the “by Households” version of the CDBG08 screen is shown and data has been entered “by Year”. Type ‘Y’ in this field and press enter to display the cumulative totals screen.

**NOTE:**

If you answered **Y** to Presumed Benefit on CDBG06 screen, you **do** need to report the number benefiting from the activity and their racial breakout on this screen. However, you do not need to enter the number of beneficiaries that are low and extremely low income on the Beneficiary Income Levels (CDBG13) screen. (You **will** need to enter the Total Low/Mod Beneficiaries which should be the same number as the Total Number Benefiting from the Activity that you enter on this screen.) For more background, read the [CDBG Guidance](#) for completing the CDBG08 screen.



Format with data “by Persons” entered post – release 9.0:

Format with data “by Households” entered post – release 9.0:

Chapter last updated: January 9, 2006 Content revised for IDIS Version 9.0 (December 12, 2005) Page 8-57

## Format with data entered "by Persons"- pre-release 9.0.:

MM/DD/YY	HH:MM	CDBG DIRECT BENEFIT DATA - by Persons		CDBG08
Grantee Activity ID		XXXXXXXXXXXXXXXXXXXX		IDIS Activity ID
Activity Name		XXXXXXXXXXXXXXXXXXXX		Natl/Obj
Activity Name		XXXXXXXXXXXXXXXXXXXX		XXXXXX
Totals as of CCYY / MM / DD				
----T O T A L----				
-Totals (All Years)-				
Race	--All--	--Hisp--	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
Totals:	9,999,999	9,999,999	9,999,999	9,999,999

Insert/Delete program year(I/D)? \_

XXXXXXXXXXXXXXXX message line XXX

F1=HELP F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE

F15=SWITCH TO COUNTS BY HOUSEHOLDS

## Format with data entered "by Households" pre-release 9.0:

MM/DD/YY	HH:MM	CDBG DIRECT BENEFIT DATA - by Households		CDBG08
Grantee Activity ID		XXXXXXXXXXXXXXXXXXXX		IDIS Activity ID
Activity Name		XXXXXXXXXXXXXXXXXXXX		Natl/Obj
Activity Name		XXXXXXXXXXXXXXXXXXXX		XXXXXX
Totals as of CCYY / MM / DD				
----T O T A L----				
-Totals (All Years)-				
Race	--All--	--Hisp--	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
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---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
---	---	---	---	---
Totals:	9,999,999	9,999,999	9,999,999	9,999,999

Fem-HH: \_\_\_\_\_

Insert/Delete program year(I/D)? \_

XXXXXXXXXXXXXXXX message line XXX

F1=HELP F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE

F15=SWITCH TO COUNTS BY PERSONS

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Program Year:	✓	Only enterable when you have requested an insert or there are entering beneficiary data for the first time. You must type a valid year to be inserted.	4 Digit year
Race	✓	11 White 12 Black/African American 13 Asian 14 American Indian/Alaskan Native 15 Native Hawaiian/Other Pacific Islander 16 American Indian/Alaskan Native & White 17 Asian & White 18 Black/African American & White 19 American Indian/Alaskan Native & Black/African 20 Other Multi-Racial 21 Asian/Pacific Islander (obsolete for display only) 22 Hispanic (obsolete for display only)	2 numeric characters.
All (Total, Owner, Renter) counts column by persons or households	✓ <sup>1</sup>	Report the number of households/persons benefiting from this activity  Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.	6 numeric characters.
Hisp(Total, Owner, Renter) counts column by persons or households		Report the number of Hispanic households/persons benefiting from this activity. This is a subset of the "All" category above and must be <= that count for each category.  Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any	6 numeric characters.

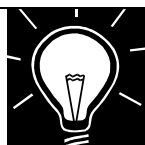
<sup>1</sup> At least one entry must be made for any line entered. Zero is a valid entry.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.	
Number of Female-Headed Households		When entered, it cannot exceed column total for which it is associated.	6 numeric characters.
<b>Note:</b> F15 toggles between Households and Persons when available. F15 will not be available when you do not have that choice because of the current National Objective and or Matrix Code entered for the activity.			
Press <Enter> to save the information and proceed to the next screen.			

## 8.6.4 Entering Additional Low/Mod Beneficiary Data (CDBG13)

### SCREEN: CDBG Beneficiary Income Levels screen (CDBG13)

**PURPOSE:** For LMC\* activities, this screen further describes the number of low/mod persons/households benefiting from this CDBG activity. Beginning with release 9.0, you will need to enter the total number of extremely low, low, moderate, and non-low/moderate beneficiaries. Some numbers may be 0, depending on the actual clientele. There are four different variations of this screen for 'LMC\*' activities (each variation is shown). It will look different depending on whether the data was entered prior to release 9.0 or entered "by year" post release 9.0. Additionally, in some cases you can choose whether the data will be entered by persons or by households. When this is an option, pressing the F15 key can make the selection of households/persons. You will not always have the choice to do so. It depends on what setup data is present. All of the fields are explained here although you may or may not see them depending on whether the data was entered before or after release 9.0. If the matrix code for the activity is: '04', '08', '05R', '05S', '05T', OR '14H' you will have the option to switch to households, otherwise you must enter the data by persons. See this [web page](#) for guidance from the CDBG Program Office on completing this screen.



#### NOTE:

If you answered **Y** to Presumed Benefit on the CDBG Activity Information screen, you **do** need to enter the number of beneficiaries by income level on this screen. For more background, read the [CDBG Guidance](#) for completing the CDBG13 screen.

### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <Enter> to go to the next screen in the completion path.

#### Program year:

1. This will only display when you have entered an 'I' in the "Insert/Delete program year(I/D)?" question, or when there are no years present. Type the year to be inserted and press enter.

**Note:** The two display only fields described directly below this are mutually exclusive to this one, so they are displayed on the same line, in the same place at different times depending on when they're needed.

#### Totals For Program Year: YYYY

2. Display only: The year for which you are entering/viewing data.

<b>Totals as of YYYY/MM/DD</b>	3. Display only: For activities where benefit data was entered prior to release 9.0 and the data is unconverted, the system will display the total counts previously entered. Those counts will be considered to be cumulative through the date of release 9.0.
<b>Total Extremely Low Income Beneficiaries</b>	4. Type the number of persons/households benefiting from this activity whose income does not exceed 30% of the median family income.
<b>Total Low Income Beneficiaries</b>	5. Type the number of persons/households benefiting from this activity whose income exceeds 30% but does not exceed 50% of the median family income.
<b>Total Moderate Income Beneficiaries</b>	6. Type the number of persons/households benefiting from this activity whose income exceeds 50% but does not exceed 80% of the median family income
<b>Total Non-Low/Moderate Beneficiaries</b>	7. Type the total number of persons/households benefiting from this activity whose income exceeds 80% of the median family income.
<b>Insert/Delete program year(I/D)?</b>	8. If you need to enter a new year of benefit data, type "I" in this field. A clean screen will be presented where you will enter the new year and appropriate counts.  To delete a previously entered year's data, type "D" in this field. The data for the year displayed on the screen will be deleted. It will also delete "racial/ethnicity" data associated with the year being deleted.
<b>Display cumulative totals(Y/N)?</b>	9. This will display only when the "by Households" version of the CDBG13 screen is shown and data has been entered "by Year". Type 'Y' in this field and press enter to display the cumulative totals screen.



```

MM/DD/YY  HH:MM      CDBG BENEFICIARY INCOME LEVELS - by Persons      CDBG13

Grantee Activity ID xxxxxxxxxxxxxxxxxxxxxxxx      IDIS Activity ID zzzzzzz9
Activity Name      xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Natl/Obj xxxxx

Persons Benefiting: 99,999

Totals as of YYYY / MM / DD

Income Level      Total      Total
                  All Yrs

Extremely Low      _____      999,999
Low                _____      999,999
Moderate           _____      999,999
Non-Low/Moderate   _____      999,999
Total 9,999,999      9,999,999

Percent Low/Mod      999.99%

Insert/Delete program year(I/D)? _

XXXXXXXXXXXXXXXXXX message line XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
F3=VALDT      F4=MAIN MENU      F5=PROJ INFO      F7=PREV      F8=NEXT      F9=SAVE
F15=SWITCH TO COUNTS BY HOUSEHOLDS      F17=PREV YEAR      F18=NEXT YEAR

```

```

MM/DD/YY  HH:MM      CDBG BENEFICIARY INCOME LEVELS - by Households      CDBG13

Grantee Activity ID xxxxxxxxxxxxxxxxxxxxxxxx      IDIS Activity ID zzzzzzzz9
Activity Name      xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Natl/Obj xxxxx

Households Benefiting: 99,999

Totals as of YYYY / MM / DD

Income Level      Total      Total
                  All Yrs

Extremely Low      _____      999,999
Low                _____      999,999
Moderate           _____      999,999
Non-Low/Moderate   _____      999,999
Total 9,999,999      9,999,999

Percent Low/Mod      999.99%

Insert/Delete program year(I/D)? _

XXXXXXXXXXXXXXXXXX message line XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE
F15=SWITCH TO COUNTS BY PERSONS      F17=PREV YEAR      F18=NEXT YEAR

```



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
IDIS Activity ID		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Natl/Obj		Carried forward from the CDBG NATIONAL OBJECTIVE Screen (CDBG01)	Protected field
Persons Benefiting		Carried forward from the Direct Benefit Screen (CDBG08).	Protected field
Total Extremely Low Income Beneficiaries		Type the number of persons/households benefiting from this activity whose income does not exceed 30% of the median family income.	6 numeric characters
Total Low Income Beneficiaries		Type the number of persons/households benefiting from this activity whose income exceeds 30% but does not exceed 50% of the median family income.	6 numeric characters
Total Moderate Income Beneficiaries		Type the number of persons/households benefiting from this activity whose income exceeds 50% but does not exceed 80% of the median family income.	6 numeric characters
Total Non-Low/Moderate Beneficiaries		Type the number of persons/households benefiting from this activity whose income exceeds 80% of the median family income.	6 numeric characters
Percentage of Low/Mod Beneficiaries		This field is calculated for you automatically when you press <F3> or <F9>. It shows the Total Low/Mod Beneficiaries as a percentage of Total Beneficiaries.	Protected field
<b>Note:</b> F15 toggles between Households and Persons when available. F15 will not be available when you do not have that choice because of the current National Objective code for the activity.			
Press <Enter> to save the information and proceed to the next screen.			

## 8.7 The CDBG LMH Path Screens

When you select a National Objective Code of LMH or LMHSP on the CDBG NATIONAL OBJECTIVE Screen (CDBG01), the system displays this series of screens.

Entitlement Grantees	State Grantees
*Funding Sources (CDBG02) <i>See Section 8.5.1</i>	*Funding Sources (CDBG02) <i>See Section 8.5.1</i>
*Organization carrying out activity (CDBG03) <i>See Section 8.5.2</i>	*Organization carrying out activity (CDBG03) <i>See Section 8.5.2</i>
*Subrecipient/CBDO Screen (CDBG04) <i>See Section 8.5.2</i>	*Organization Carrying Out Activity - Cont. (CDBG04) <i>See Section 8.5.2</i>
*Form of Assistance (CDBG05) <i>See Section 8.5.3</i>	*Form of Assistance (CDBG05) <i>See Section 8.5.3</i>
CDBG Activity Screen (CDBG06)	CDBG Activity Screen (CDBG06)
CDBG Multi-Unit Housing Activity (CDBG14)	CDBG Multi-Unit Housing Activity (CDBG14)
CDBG Housing Rehabilitation (CDBG09)	CDBG Housing Rehabilitation (CDBG09)
CDBG Direct Benefit Data (CDBG08)	CDBG Direct Benefit Data Screen (CDBG08)
CDBG Beneficiary Income Levels (CDBG13)	CDBG Beneficiary Income Levels Screen (CDBG13)
*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>	*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>
*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>	*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>

(Screens with an \* are used by more than one NOC and are described elsewhere in this chapter.)



### ENTERING BENEFICIARY COUNTS FOR DIRECT BENEFIT ACTIVITIES:

For all LMH activities, beneficiary counts should be based on **Households**.

## 8.7.1 Entering CDBG Activity Information (CDBG06)

**SCREEN:** **CDBG Activity Information** **(CDBG06)**

---

### How To Complete This Screen:



#### One-for-One Replacement

Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to go to the next screen in the completion path.

1. Type **X** if this activity is a One-for-One replacement activity. This means the activity being assisted results in the conversion or demolition of one or more dwelling units that must be replaced.

If you type **X** here, the system will automatically display the One-for-One Replacement Screen (CDBG16) as part of the CDBG completion path.

(Leave the field blank if not applicable.)

#### Special Assessment

2. Type **X** if this is a public improvement activity for which a special assessment will be levied.

(Leave the field blank if not applicable.)

#### Displacement

3. Type **X** if this is a displacement activity, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of a CDBG-assisted rehabilitation, demolition, or acquisition activity.

If you type **X** here, the system will automatically display the Displacement Screen (CDBG15) as part of the CDBG completion path.

(Leave the field blank if not applicable.)

#### Revolving Fund

4. Type **X** if this activity is funded through a revolving fund with a set of accounts that are independent of other program accounts.

(You established this account so that you could carry out specific activities that would generate payments to the fund to carry out the same type of activities.)

(Leave the field blank if not applicable.)

#### Float Funded

5. Type **X** if this activity is float funded. Float funding is a financing technique under which an eligible activity is carried out using CDBG funds that were also programmed for one or more other activities at the time the funds were committed to the new activity.

This technique is based on the premise that some activities do not require funds immediately and that a recipient's unexpended CDBG funds will contain a balance (the *float*) that can be used on a temporary basis to fund other activities. Activities financed with float loans must generate a sufficient level of program income within an established time frame to enable the grantee to carry out the activities that were initially programmed.

**Favored Activity**

6. Type **X** if this activity a *Favored Activity*, that is an economic development activity with a matrix code of 18A or 18B that is of important national interest and therefore may be excluded from the aggregate public benefit calculation. (Ref. 24 CFR 570.209(b)(2)).

(Leave the field blank if not applicable.)

**Colonia**

7. Type **X** if this activity is located within a community outside a metropolitan area with a population exceeding one million, that is within 150 miles of the U.S. – Mexico border in AZ, CA, NM and TX and lacks adequate infrastructure and decent, safe and sanitary housing.

**Brownfield**

8. Type **X** if this activity is located in an area designated as a brownfield redevelopment area. A brownfield is an abandoned, idled, or underused property where expansion or redevelopment is complicated by the presence or potential presence of environmental contamination.

**Funds to be Received**

9. If you indicate that this is a Float Funded activity, you must enter the date the Funds To Be Received (that is, the date the repayment is expected to be made) and the Float Principal Balance.

(Leave the field blank if not applicable.)

**Float Principal Balance**

10. If this is a float funded activity, type the Float Fund Principal Balance.

**Multi-Unit Housing (2+ units/structure) (Y/N)**

11. This question will only appear on the screen for LMH\* activities. If the activity involves two or more units per structure, enter **Y**. (IDIS calculates the benefit to low/mod differently for multi-unit housing than single unit housing.)

**For LMH activities with a matrix code of 14a, rehab/single unit residential, the system displays an N in this field and it must remain N.**

**For LMH activities with a matrix code of 14b, multi-unit rehab housing residential, the system displays a Y in this field and it must remain Y.**

For other matrix codes, if you enter Y in this field, you must also complete the fields on the Multi-Unit Housing screen (CDBG14) before you can fund the activity.

**Indicate if activity is located in a Strategy, CDFI, or Local Target Area (S/C/L)**

13. If the activity is located in a Community Development Financial Institution (CDFI) Area or a Neighborhood Revitalization Strategy Area, enter **C** for CDFI Area or **S** for Neighborhood Revitalization Strategy Area, and then enter the Area Identifier in the next field. If the activity is located in a Local Target Area, enter **L** but do not enter an Area Identifier.

**NOTE:** If these two fields do not apply to your jurisdiction, leave them blank.

Effective with Version 6.7, the following entries are required.\*\*

For activities with an NOC of LMHSP, you must enter **C** or **S** into this field and an area identifier in the next field.

For activities with an NOC of LMAFI, you must enter **C** into this field and an area identifier in the next field.

For activities with an NOC of LMASA, you must enter **S** into this field and an area identifier in the next field.

**Area Identifier**

14. If you entered **S** or **C** in the previous field, type the Area Identifier for the Neighborhood Revitalization Strategy Area or CDFI Area in which the activity is located.

**NOTE:** if you do not know the ID of the Area Identifier for a CDBG CDFI or NRSA Area, press F1. If a list of identifiers already exists, IDIS will display it. Otherwise, you will be prompted to add a new identifier. (To use this feature, you must have IDIS permission to use the Table Maintenance features; contact your IDIS administrator for assistance.)

---

\*\* These requirements do not apply to: 1) Activities with a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.




DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Special Assessment		Is this a public improvement activity for which a special assessment will be levied?	X or blank
Displacement		<p>Does this activity involve a displacement activity, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of a CDBG-assisted rehabilitation, demolition, or acquisition activity?</p> <p><b>NOTE:</b> If you type an <b>X</b> here, the system will automatically generate the Displacement Screen (CDBG15) as part of the CDBG completion path.</p>	X or blank
Revolving Fund		<p>Is this activity funded through a revolving fund with a set of accounts that are independent of other program accounts?</p> <p>(You established this account so that you could carry out specific activities that would generate payments to the fund to carry out the same types of activities.)</p>	X or blank
Float Funded		<p>Is this a float funded activity?</p> <p>Float funding is a financing technique under which an eligible activity is carried out using CDBG funds that were also programmed for one or more other activities at the time the funds were committed to the new activity.</p> <p>This technique is based on the premise that some activities do not require funds immediately and that a recipient's unexpended CDBG funds will contain a balance (the <i>float</i>) that can be used on a temporary basis to fund other activities. Activities financed with float loans must generate a sufficient level of program income within an established time frame to enable the grantee to carry out the activities that were initially programmed.</p> <p><b>NOTE:</b> If you indicate that this is a Float Funded activity, you <i>must</i> enter data into the fields: Funds To Be Received and Float Principal Balance.</p>	X or blank
Favored Activity		Type <b>X</b> if this activity a <i>Favored Activity</i> , that is an economic development activity with a matrix code of 18A or 18B that is of important national interest and therefore may be excluded from the aggregate public benefit calculation. (Ref. 24 CFR 570.209(b)(2)).	X or blank
Colonia Activity		Type <b>X</b> if this activity is located within a community outside a metropolitan area with a population	X or blank

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		exceeding one million, that is within 150 miles of the U.S. – Mexico border in AZ, CA, NM and TX and lacks adequate infrastructure and decent, safe and sanitary housing.	
Brownfield		Type <b>X</b> if this activity is located in an area designated as abrownfield redevelopment area. A brownfield is an abandoned, idled, or underused property where expansion or redevelopment is complicated by the presence or potential presence of environmental contamination.	X or blank
Float Principal Balance	Only if Float Funded = X	If this is a float funded activity, type the Float Fund Principal Balance.	\$nnnnnnnnnn
Multi-Unit Housing (2+ Units/Structure) (Y/N)		<p>For LMH activities, if the activity involves two or more units per structure, enter <b>Y</b>.</p> <p><b>For LMH activities with a matrix code of 14a, rehab/single unit residential, or for activities with any other national objective, you must enter N in this field.</b></p> <p><b>For LMH activities with a matrix code of 14b, multi-unit rehab housing residential, you must enter Y in this field.</b></p> <p>If you enter Y in this field, you must also complete all fields on the CDBG Multi-Unit Housing screen (CDBG14) before you can fund the activity.*</p>	Y, N, or blank
Indicate If The Activity Is Located in a Neighborhood Revitalization Strategy Area, CDFI Area, or Local Target Area: (S/C/L)		<p>If the activity is located in a Community Development Financial Institution (CDFI) Area or a Neighborhood Revitalization Strategy Area, enter <b>C</b> for CDFI Area or <b>S</b> for Neighborhood Revitalization Strategy Area, and then enter the Area Identifier in the next field. If the activity is located in a Local Target Area, enter <b>L</b>. You do not need to enter an Area ID for Local Target Area activities. If these two fields do not apply to your jurisdiction, leave them blank.</p> <p>Effective with Version 6.7, the following entries are required.*</p>	<p>S = NRSA Area</p> <p>C = CDFI Area</p> <p>L = Local Target Area</p>

\* These requirements do not apply to: 1) Activities being carried out by States; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

\* These requirements do not apply to: 1) Activities with a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		<p>For activities with an NOC of LMHSP, you must enter <b>C</b> or <b>S</b> into this field and an area identifier in the next field.</p> <p>For activities with an NOC of LMAFI, you must enter <b>C</b> into this field and an area identifier in the next field.</p> <p>For activities with an NOC of LMASA, you must enter <b>S</b> into this field and an area identifier in the next field.</p>	
Area Identifier	 (Only if C or S in Previous Field)	<p>If you entered <b>C</b> or <b>S</b> in the previous field, type the Area Identifier for the CDFI Area or Neighborhood Revitalization Strategy Area in which the activity is located.</p> <p><b>NOTE:</b> if you do not know the ID of the Area Identifier for a CDBG CDFI or NRSA Area, press &lt;F1&gt;. If a list of identifiers already exists, IDIS will display it. Otherwise, you will be prompted to add a new identifier. (To use this feature, you must have IDIS permission to use the Table Maintenance features; contact your IDIS administrator for assistance.)</p>	2 numeric characters
Press <Enter> to save the information and move to the next screen in the CDBG path.			

## 8.7.2 Entering Multi-unit Housing Activity Data (CDBG14)

### SCREEN: Multi-Unit Housing Activity (CDBG14)

**PURPOSE:** If you answered **Y** to the “Multi-Unit Housing” prompt on the CDBG Activity Information screen (CDBG06), this screen will display in the LMH path. On it you describe the current total number of units and number of low/mod units and the expected number of units and low/mod units at the completion of the activity (CDBG defines multi-unit housing as two or more units per structure.) This screen also requires you indicate any non-CDBG funds expected to be used to carry out the activity.



#### NOTE:

For multi-unit housing activities, you must enter non-blank values in the following fields before the activity can be funded: total units at start, total units occupied at start, total units occupied by low/mod at start, total units expected at completion, total units expected to be occupied at completion, total units expected to be occupied by low/mod at completion. (Zero is an acceptable entry.)

### How To Complete This Screen:



Where appropriate, enter the following Multi Unit Activity setup data. If the data entered does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.

After you enter data into fields on this screen, if you press **<F3>** or **<F9>**, the screen will refresh with the Percent Low/Mod.

After you complete the fields on this screen, press **<Enter>** to save the information and display the CDBG Housing Rehabilitation screen (CDBG09).

#### UNITS AT START

1. Type data into the following three fields.

**TOTAL** The total number of units at the start of the activity.

**OCCUPIED** The number of units that were occupied at the start of the activity.

**OCCUPIED LOW/MOD**  
The number of units that were occupied by low and moderate-income households at the start of the activity.

**UNITS EXPECTED AT COMPLETION**

2. Type data into the following three fields. These are your projected or estimated values at completion.

**TOTAL** The total number of units that are expected to be available at the completion of the activity.

**OCCUPIED** The total number of units that are expected to be occupied at the completion of the activity.

**OCCUPIED LOW/MOD**  
The total number of units that are expected to be occupied by low and moderate-income households at the completion of the activity.

```

MM/DD/YY  HH:MM          CDBG MULTI-UNIT HOUSING ACTIVITY          CDBG14

Grantee Activity ID xxxxxxxxxxxxxxxxxxxx          IDIS Activity ID zzzzzzz9
Activity Name          xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Natl/Obj xxxxxx

Units at Start:          Total      Occupied      Occupied      Percent
                        _____      _____      Low/Mod      Low/Mod
                        999.99%
Units Expected at Completion:          _____      _____      _____      999.99%

F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE

```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
IDIS Activity ID		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Ntl/Obj		Carried forward from the CDBG NATIONAL OBJECTIVE Screen (CDBG01).	Protected field

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
<b>Units at Start</b>			
Total	✓*	What is the total number of (housing) units at the start of the activity?	4 numeric characters
Occupied	✓*	What are the number of (housing) units that are occupied at the start of the activity?	4 numeric characters
Occupied Low/Mod	✓*	What are the number of (housing) units that are occupied by low/mods at the start of the activity?	4 numeric characters
Percent Low/Mod		Automatically calculated when you press <F3> or <F9> to update the screen.	Protected field

---

\* Required for all multi-unit LMH activities before activity can be funded (not required for States). This requirement does not apply to: 1) Activities being carried out by States; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

### 8.7.3 Entering CDBG Housing Rehabilitation Data (CDBG09)

**SCREEN:**                      **CDBG Housing Rehabilitation Screen**                      **(CDBG09)**

**PURPOSE:** For activities with matrix code **14A, 14B, 14C, 14D, 14F, 14G, or 16A**, the CDBG Housing Rehabilitation screen (CDBG09) will display in the LMH sequence. You will denote if the rehabilitation involved any of the items shown on the screen **only** if the activity was limited to one or more of these items. If the activity provided assistance for items not listed on this screen (ie: roofs), **do not** enter anything on this screen.

---

#### How To Complete This Screen:



Where appropriate, enter an "X" next to any of the items that apply to the activity. (If an individual entry does not apply, press **<Tab>** to go to the next field.)

If none of the items apply to the activity, press **<Enter>** to go to the next screen.

**Installing Security Devices**

1. Enter "X" if the activity included installation of security devices.

**Installing smoke detectors**

2. Enter "X" if the activity included installation of smoke detectors.

**Performing emergency housing repairs**

3. Enter "X" if the activity included performing emergency housing repairs.

**Providing supplies and equipment for painting houses**

4. Enter "X" if the activity provided supplies and equipment for painting houses.

**Operating a Tool Lending Library**

5. Enter "X" if the activity provided assistance for operating a tool lending library.
-

MM/DD/YY	HH:MM	CDBG HOUSING REHABILITATION	CDBG09
Grantee Activity ID		xxxxxxxxxxxxxxxxxxxxxx	IDIS Activity ID
Activity Name		xx	Natl/Obj
		xxxxxx	
<p>Indicate if this activity is limited to one or more of the following: (Enter "X" for all that apply)</p> <ul style="list-style-type: none"> <li>_ Installing security devices</li> <li>_ Installing smoke detectors</li> <li>_ Performing emergency housing repairs</li> <li>_ Providing supplies and equipment for painting houses</li> <li>_ Operating a Tool Lending Library</li> </ul> <p>If none apply, press &lt;Enter&gt; to go to the next screen.</p>			
<p>F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE</p>			

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
IDIS Activity ID		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Ntl/Obj		Carried forward from the CDBG NATIONAL OBJECTIVE Screen (CDBG01).	Protected field
Installing security devices		Enter "X" if the activity included installation of security devices.	X or blank
Installing smoke detectors		Enter "X" if the activity included installation of smoke detectors.	X or blank
Performing emergency housing repairs		Enter "X" if the activity included performing emergency housing repairs.	X or blank

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Providing supplies and equipment for painting houses		Enter "X" if the activity provided supplies and equipment for painting houses.	X or blank
Operating a Tool Lending Library		Enter "X" if the activity provided assistance for operating a tool lending library.	X or blank

## 8.7.4 Entering Direct Benefit Data (CDBG08)

### SCREEN: Direct Benefit Data screen (CDBG08)

**PURPOSE:** For LMH and LMHSP activities, you enter the count of *households* directly benefiting from the CDBG activity as well as their racial and ethnic breakdown. You must also enter the count of owners by *households* for activities with a Matrix code or '05R' and '13' whether or not they are LMH or LMHSP. There are two different variations of this screen for activities (each variation is shown). It will look different depending on whether the data was entered prior to release 9.0 or entered "by year" post release 9.0. All of the fields are explained here although you may or may not see them depending on whether the data was entered before or after release 9.0.

**Note:** Counts **MUST** also be by households for SBA, SBR, SBS, or URG when the Matrix code is 12, 14A, 14B, 14C, 14D, 14F, 14G, 14I, or 16A. This is for state grantees only.

See this [web page](#) for guidance from the CDBG Program Office on completing this screen.

---

#### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <Enter> to go to the next screen in the completion path.

---

#### Program year:

1. This will only display when you have entered an 'I' in the "Insert/Delete program year(I/D)?" question, or when there is no data present, as in when you first enter an activity. Type the year to be inserted and press enter.

**Note:** This field, and the next two fields described are mutually exclusive, so they are displayed on the same line, in the same place at different times depending on when they're needed.

#### Totals for program year:

2. Display only: This will only display for converted or new data. Data entered prior to release 9.0 that has not been converted will display the field below instead. Beginning with release 9.0, direct benefit data should be reported on an annual basis. The program year for which data is being reported is displayed here.

#### Totals as of yyyy/mm/dd

3. Display only: For activities where benefit data was entered prior to release 9.0 and the data is unconverted, the system will display the total counts previously entered. Those counts will be considered to be cumulative through the date of release 9.0.



**Race**

4. Type the race code of the counts to be entered on this line. Report the number of households served by the following groups for all direct benefit activities where you maintain a personal record. If you don't maintain a personal record, provide the information from a spot survey or an estimate of persons using the facility or service.

Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.

**RACE, cont'd**

Effective with Version 7.0, Hispanic will be an ethnicity category within IDIS that cuts across all races. Those who are White, Black, Asian, Pacific Islander, American Indian, or Other Multi-Racial may also be counted as being Hispanic.

Race Codes are available using the F1 key on this field.

Valid race codes are as follows:

11. White. A person having origins in any of the original peoples of Europe, North Africa or the Middle East.
12. Black or African American. A person having origins in any of the black racial groups of Africa. Terms such as "Haitian" or "Negro" can be used in addition to "Black or African American."
13. Asian. A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand and Vietnam.
14. American Indian or Alaska Native. A person having origins in any of the original peoples of North and South America (including Central America), and who maintains affiliation or community attachment.
15. Native Hawaiian or Other Pacific Islander. A person having origins in any of the original people of Hawaii, Guam, Samoa or other Pacific Islands.
16. American Indian or Alaska Native & White. A person having these multiple race heritages as defined above.
17. Asian & White. A person having these multiple race heritages as defined above.
18. Black or African American & White. A person having these multiple race heritages as defined above.
19. American Indian or Alaska Native & Black or African American. A person having these multiple race heritages as defined above.

Other Multi Racial. For reporting individual responses that are not included in any of the other categories listed above.

**Totals for “All” and  
“Hispanic” / Owner/Renter**

5. These columns will vary in title and numbers depending on whether the data is converted or unconverted. All of the fields in this group are numeric and are optional.

**Note:** Although these fields are optional, they constitute the total beneficiary count. So some values must be entered or you will not be able to complete the activity.

**Insert/Delete program  
year(I/D)?**

6. If you need to enter a new year of benefit data, type “I” in this field. A clean screen will be presented where you will enter the new year and appropriate counts.

To delete a previously entered year’s data, type “D” in this field. The data for the year displayed on the screen will be deleted. It will also delete any low income data associated with the year being deleted.

**Display cumulative  
totals(Y/N)?**

7. This will display only for the converted “by Households” version of the CDBG08 screen. Type ‘Y’ in this field and press enter to display the cumulative totals screen.

**NOTE:**

If you answered **Y** to Presumed Benefit on CDBG06 screen, you **do** need to report the number benefiting from the activity and their racial breakout on this screen. However, you do not need to enter the number of beneficiaries that are low and extremely low income on the Beneficiary Income Levels (CDBG13) screen. (You **will** need to enter the Total Low/Mod Beneficiaries which should be the same number as the Total Number Benefiting from the Activity that you enter on this screen.) For more background, read the [CDBG Guidance](#) for completing the CDBG08 screen.

The two variations of the CDBG08 screen are shown here:

Format with data entered “by Households” post release 9.0:

MM/DD/YY HH:MM CDBG DIRECT BENEFIT DATA - by Households					CDBG08	
Grantee Activity ID XXXXXXXXXXXXXXXXXXXX					IDIS Activity ID XXXXXXXX	
Activity Name XX					Nat1/Obj XXXXX	
[ Program Year: _____ ]						
[Totals for program year: CCYY _____]						
	----O W N E R----		---R E N T E R---		-Totals (All Years)-	
Race	--All--	--Hisp-	--All--	--Hisp-	---All---	--Hisp---
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
Totals:	9,999,999	9,999,999	9,999,999	9,999,999	99,999,999	99,999,999
Fem-HH: _____						
Insert/Delete program year(I/D)? _____ Display cumulative totals(Y/N)? _____						
XXXXXXXXXXXXXXXX message line XX						
F1=HELP F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE						
F15=SWITCH TO COUNTS BY PERSONS F17=PREV YEAR F18=NEXT YEAR						

Format with data “by Households” entered pre – release 9.0:

MM/DD/YY HH:MM CDBG DIRECT BENEFIT DATA - by Households					CDBG08	
Grantee Activity ID XXXXXXXXXXXXXXXXXXXX					IDIS Activity ID XXXXXXXX	
Activity Name XX					Nat1/Obj XXXXX	
Totals as of CCYY / MM / DD						
	----T O T A L----		-Totals (All Years)-			
Race	--All--	--Hisp-	--All--	--Hisp-		
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
---	_____	_____	_____	_____	99,999,999	99,999,999
Totals:	9,999,999	9,999,999	9,999,999	9,999,999	99,999,999	99,999,999
Fem-HH: _____						
XXXXXXXXXXXXXXXX message line XX						
F1=HELP F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE						
F15=SWITCH TO COUNTS BY PERSONS						

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Program Year:	✓	Only displayed when you have requested an insert or there are no years present, you must type a valid year to be inserted.	4 Digit year
Race	✓	11 White 12 Black/African American 13 Asian 14 American Indian/Alaskan Native 15 Native Hawaiian/Other Pacific Islander 16 American Indian/Alaskan Native & White 17 Asian & White 18 Black/African American & White 19 American Indian/Alaskan Native & Black/African 20 Other Multi-Racial 21 Asian/Pacific Islander (obsolete for display only) 22 Hispanic (obsolete for display only)	2 numeric characters.
All (Total, Owner, Renter) counts column by persons or households	✓ <sup>1</sup>	Report the number of households benefiting from this activity  Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.	6 numeric characters.
Hisp(Total, Owner, Renter) counts column by persons or households		Report the number of Hispanic households benefiting from this activity. This is a subset of the "All" category above and must be <= that count for each category.  Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any	6 numeric characters.

<sup>1</sup> At least one entry must be made for any line entered. Zero is a valid entry.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.	
Number of Female-Headed Households		When entered, it cannot exceed column total for which it is associated.	6 numeric characters.
Press <Enter> to save the information and proceed to the next screen.			

## 8.7.5 Entering Additional Low/Mod Beneficiary Data (CDBG13)

**SCREEN:** CDBG Beneficiary Income Levels screen (CDBG13)

**PURPOSE:** For LMH and LMHSP activities, this screen further describes the number of low/mod *households* benefiting from this CDBG activity. Beginning with release 9.0, you will need to enter the total number of extremely low, low, moderate, and non-low/moderate beneficiaries. Some numbers may be 0, depending on the actual clientele. There are two different variations of this screen for activities (each variation is shown). It will look different depending on whether the data was entered prior to release 9.0 or entered “by year” post release 9.0. You must also enter the count of *households* for activities with a Matrix code or ‘05R’ and ‘13’ whether or not they are LMH or LMHSP. All of the fields are explained here although you may or may not see them depending on whether the data was entered before or after release 9.0.

**Note:** Counts **MUST** also be by households for SBA, SBR, SBS, or URG when the Matrix code is 12, 14A, 14B, 14C, 14D, 14F, 14G, 14I, or 16A. This applies to state grantees only.

See this [web page](#) for guidance from the CDBG Program Office on completing this screen.



**NOTE:**

If you answered **Y** to Presumed Benefit on the CDBG Activity Information screen, you **do** need to enter the number of beneficiaries by income level on this screen. For more background, read the [CDBG Guidance](#) for completing the CDBG13 screen.

---

### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to go to the next screen in the completion path.

<b>Program year:</b>	<p>1. This will only display when you have entered an 'I' in the "Insert/Delete program year(I/D)?" question, or when there are no years present. Type the year to be inserted and press enter.</p> <p><b>Note:</b> The two display only fields described directly below this are mutually exclusive to this one, so they are displayed on the same line, in the same place at different times depending on when they're needed.</p>
<b>Totals For Program Year: YYYY</b>	<p>2. Display only: The year for which you are entering/viewing data.</p>
<b>Totals as of YYYY/MM/DD</b>	<p>3. Display only: For activities where benefit data was entered prior to release 9.0 and the data is unconverted, the system will display the total counts previously entered. Those counts will be considered to be cumulative through the date of release 9.0.</p>
<b>Total Extremely Low Income Beneficiaries</b>	<p>4. Type the number of households benefiting from this activity whose income does not exceed 30% of the median family income.</p>
<b>Total Low Income Beneficiaries</b>	<p>5. Type the number of households benefiting from this activity whose income exceeds 30% but does not exceed 50% of the median family income.</p>
<b>Total Moderate Income Beneficiaries</b>	<p>6. Type the number of households benefiting from this activity whose income exceeds 50% but does not exceed 80% of the median family income</p>
<b>Total Non-Low/Moderate Beneficiaries</b>	<p>7. Type the total number of households benefiting from this activity whose income exceeds 80% of the median family income.</p>
<b>Insert/Delete program year(I/D)?</b>	<p>8. If you need to enter a new year of benefit data, type "I" in this field. A clean screen will be presented where you will enter the new year and appropriate counts.</p> <p>To delete a previously entered year's data, type "D" in this field. The data for the year displayed on the screen will be deleted. It will also delete any racial/ethnicity data associated with the year being deleted.</p> <p><b>Note:</b> This action is not reversible and you will not be asked again (other than to confirm your action) if you answer 'Y' to this prompt.</p>
<b>Display cumulative totals(Y/N)?</b>	<p>9. This will display only when the data has been entered "by Year". Type 'Y' in this field and press enter to display the cumulative totals screen</p>

Format with data “by Households” entered post – release 9.0:

Format with data “by Households” entered pre-release 9.0:

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DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
IDIS Activity ID		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Natl/Obj		Carried forward from the CDBG NATIONAL OBJECTIVE Screen (CDBG01)	Protected field
Persons Benefiting		Carried forward from the Direct Benefit Screen (CDBG08).	Protected field
Total Extremely Low Income Beneficiaries		Type the number of households benefiting from this activity whose income does not exceed 30% of the median family income.	6 numeric characters
Total Low Income Beneficiaries		Type the number of households benefiting from this activity whose income exceeds 30% but does not exceed 50% of the median family income.	6 numeric characters
Total Moderate Income Beneficiaries		Type the number of households benefiting from this activity whose income exceeds 50% but does not exceed 80% of the median family income.	6 numeric characters
Total Non-Low/Moderate Beneficiaries		Type the number of households benefiting from this activity whose income exceeds 80% of the median family income.	6 numeric characters
Percentage of Low/Mod Beneficiaries		This field is calculated for you automatically when you press <F3> or <F9>. It shows the Total Low/Mod Beneficiaries as a percentage of Total Beneficiaries.	Protected field
Press <Enter> to save the information and proceed to the next screen.			

## 8.8 The CDBG LMJ Path Screens

When you select a National Objective Code of LMJ, LMJFI, or LMJP on the CDBG Activity Screen (CDBG01), the system displays this series of screens.

Entitlement Grantees	State Grantees
*Funding Sources (CDBG02) <i>See Section 8.5.1</i>	*Funding Sources (CDBG02) <i>See Section 8.5.1</i>
*Organization carrying out activity (CDBG03) <i>See Section 8.5.2</i>	*Organization carrying out activity (CDBG03) <i>See Section 8.5.2</i>
*Subrecipient/CBDO Screen (CDBG04) <i>See Section 8.5.2</i>	*Organization Carrying Out Activity - Cont. (CDBG04) <i>See Section 8.5.2</i>
*Form of Assistance (CDBG05) <i>See Section 8.5.3</i>	*Form of Assistance (CDBG05) <i>See Section 8.5.3</i>
CDBG Activity Screen (CDBG06)	CDBG Activity Screen (CDBG06)
CDBG Direct Benefit Data (CDBG08) <i>See</i>	CDBG Direct Benefit Data Screen (CDBG08)
CDBG Beneficiary Income Levels (CDBG13)	CDBG Beneficiary Income Levels Screen (CDBG13)
Job Creation/Retention Screen (CDBG11)	Job Creation/Retention Screen (CDBG11)
*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>	*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>
*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>	*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>

(Screens with an \* are used by more than one NOC and are described elsewhere in this chapter.)

## 8.8.1 Entering CDBG Activity Information (CDBG06)

**SCREEN:** **CDBG Activity Information** **(CDBG06)**

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### How To Complete This Screen:



#### One-for-One Replacement

Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to go to the next screen in the completion path.

1. Type **X** if this activity is a One-for-One replacement activity. This means the activity being assisted results in the conversion or demolition of one or more dwelling units that must be replaced.

If you type **X** here, the system will automatically display the One-for-One Replacement Screen (CDBG16) as part of the CDBG completion path.

(Leave the field blank if not applicable.)

#### Special Assessment

2. Type **X** if this is a public improvement activity for which a special assessment will be levied.

(Leave the field blank if not applicable.)

#### Displacement

3. Type **X** if this is a displacement activity, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of a CDBG-assisted rehabilitation, demolition, or acquisition activity.

If you type **X** here, the system will automatically display the Displacement Screen (CDBG15) as part of the CDBG completion path.

(Leave the field blank if not applicable.)

#### Revolving Fund

4. Type **X** if this activity is funded through a revolving fund with a set of accounts that are independent of other program accounts.

(You established this account so that you could carry out specific activities that would generate payments to the fund to carry out the same type of activities.)

(Leave the field blank if not applicable.)

**Float Funded**

5. Type **X** if this activity is float funded. Float funding is a financing technique under which an eligible activity is carried out using CDBG funds that were also programmed for one or more other activities at the time the funds were committed to the new activity.

This technique is based on the premise that some activities do not require funds immediately and that a recipient's unexpended CDBG funds will contain a balance (the *float*) that can be used on a temporary basis to fund other activities. Activities financed with float loans must generate a sufficient level of program income within an established time frame to enable the grantee to carry out the activities that were initially programmed.

**Favored Activity**

6. Type **X** if this activity a *Favored Activity*, that is an economic development activity with a matrix code of 18A or 18B that is of important national interest and therefore may be excluded from the aggregate public benefit calculation. (Ref. 24 CFR 570.209(b)(2)).

(Leave the field blank if not applicable.)

**Colonia**

7. Type **X** if this activity is located within a community outside a metropolitan area with a population exceeding one million, that is within 150 miles of the U.S. – Mexico border in AZ, CA, NM and TX and lacks adequate infrastructure and decent, safe and sanitary housing.

**Brownfield**

8. Type **X** if this activity is located in an area designated as a brownfield redevelopment area. A brownfield is an abandoned, idled, or underused property where expansion or redevelopment is complicated by the presence or potential presence of environmental contamination.

**Funds to be Received**

9. If you indicate that this is a Float Funded activity, you must enter the date the Funds To Be Received (that is, the date the repayment is expected to be made) and the Float Principal Balance.

(Leave the field blank if not applicable.)

**Float Principal Balance**

10. If this is a float funded activity, type the Float Fund Principal Balance.

**Indicate if activity is located in a Strategy, CDFI, or Local Target Area (S/C/L)**

13. If the activity is located in a Community Development Financial Institution (CDFI) Area or a Neighborhood Revitalization Strategy Area, enter **C** for CDFI Area or **S** for Neighborhood Revitalization Strategy Area, and then enter the Area Identifier in the next field. If the activity is located in a Local Target Area, enter **L** but do not enter an Area Identifier.

**NOTE:** If these two fields do not apply to your jurisdiction, leave them blank.

Effective with Version 6.7, the following entries are required.\*\*

For activities with an NOC of LMHSP, you must enter **C** or **S** into this field and an area identifier in the next field.

For activities with an NOC of LMAFI, you must enter **C** into this field and an area identifier in the next field.

For activities with an NOC of LMASA, you must enter **S** into this field and an area identifier in the next field.

**Area Identifier**

14. If you entered **S** or **C** in the previous field, type the Area Identifier for the Neighborhood Revitalization Strategy Area or CDFI Area in which the activity is located.

**NOTE:** if you do not know the ID of the Area Identifier for a CDBG CDFI or NRSA Area, press F1. If a list of identifiers already exists, IDIS will display it. Otherwise, you will be prompted to add a new identifier. (To use this feature, you must have IDIS permission to use the Table Maintenance features; contact your IDIS administrator for assistance.)

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\*\* These requirements do not apply to: 1) Activities with a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Special Assessment		Is this a public improvement activity for which a special assessment will be levied?	X or blank
Displacement		<p>Does this activity involve a displacement activity, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of a CDBG-assisted rehabilitation, demolition, or acquisition activity?</p> <p><b>NOTE:</b> If you type an <b>X</b> here, the system will automatically generate the Displacement Screen (CDBG15) as part of the CDBG completion path.</p>	X or blank
Revolving Fund		<p>Is this activity funded through a revolving fund with a set of accounts that are independent of other program accounts?</p> <p>(You established this account so that you could carry out specific activities that would generate payments to the fund to carry out the same types of activities.)</p>	X or blank
Float Funded		<p>Is this a float funded activity?</p> <p>Float funding is a financing technique under which an eligible activity is carried out using CDBG funds that were also programmed for one or more other activities at the time the funds were committed to the new activity.</p> <p>This technique is based on the premise that some activities do not require funds immediately and that a recipient's unexpended CDBG funds will contain a balance (the <i>float</i>) that can be used on a temporary basis to fund other activities. Activities financed with float loans must generate a sufficient level of program income within an established time frame to enable the grantee to carry out the activities that were initially programmed.</p> <p><b>NOTE:</b> If you indicate that this is a Float Funded activity, you <i>must</i> enter data into the fields: Funds To Be Received and Float Principal Balance.</p>	X or blank
Favored Activity		Type <b>X</b> if this activity a <i>Favored Activity</i> , that is an economic development activity with a matrix code of 18A or 18B that is of important national interest and therefore may be excluded from the aggregate public benefit calculation. (Ref. 24 CFR 570.209(b)(2)).	X or blank
Colonia Activity		Type <b>X</b> if this activity is located within a community outside a metropolitan area with a population	X or blank

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		exceeding one million, that is within 150 miles of the U.S. – Mexico border in AZ, CA, NM and TX and lacks adequate infrastructure and decent, safe and sanitary housing.	
Brownfield		Type <b>X</b> if this activity is located in an area designated as a brownfield redevelopment area. A brownfield is an abandoned, idled, or underused property where expansion or redevelopment is complicated by the presence or potential presence of environmental contamination.	X or blank
Float Principal Balance	Only if Float Funded = X	If this is a float funded activity, type the Float Fund Principal Balance.	\$nnnnnnnnnn
Indicate If The Activity Is Located in a Neighborhood Revitalization Strategy Area, CDFI Area, or Local Target Area: (S/C/L)		<p>If the activity is located in a Community Development Financial Institution (CDFI) Area or a Neighborhood Revitalization Strategy Area, enter <b>C</b> for CDFI Area or <b>S</b> for Neighborhood Revitalization Strategy Area, and then enter the Area Identifier in the next field. If the activity is located in a Local Target Area, enter <b>L</b>. You do not need to enter an Area ID for Local Target Area activities. If these two fields do not apply to your jurisdiction, leave them blank.</p> <p>Effective with Version 6.7, the following entries are required.*</p> <p>For activities with an NOC of LMHSP, you must enter <b>C</b> or <b>S</b> into this field and an area identifier in the next field.</p> <p>For activities with an NOC of LMAFI, you must enter <b>C</b> into this field and an area identifier in the next field.</p> <p>For activities with an NOC of LMASA, you must enter <b>S</b> into this field and an area identifier in the next field.</p>	<p>S = NRSA Area</p> <p>C = CDFI Area</p> <p>L = Local Target Area</p>
Area Identifier	✓ (Only if C or S in Previous Field)	<p>If you entered <b>C</b> or <b>S</b> in the previous field, type the Area Identifier for the CDFI Area or Neighborhood Revitalization Strategy Area in which the activity is located.</p> <p><b>NOTE:</b> if you do not know the ID of the Area Identifier for a CDBG CDFI or NRSA Area, press</p>	2 numeric characters

\* These requirements do not apply to: 1) Activities with a status of "Completed" or "Cancelled;" 2) IDIS Act ID=1 through 4.



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		<F1>. If a list of identifiers already exists, IDIS will display it. Otherwise, you will be prompted to add a new identifier. (To use this feature, you must have IDIS permission to use the Table Maintenance features; contact your IDIS administrator for assistance.)	
Press <Enter> to save the information and move to the next screen in the CDBG path.			

## 8.8.2 Entering Direct Benefit Data (CDBG08)

### SCREEN: Direct Benefit screen (CDBG08)

**PURPOSE:** For LMJ\* activities, you enter the count of *persons* directly benefiting from the CDBG activity as well as their racial and ethnic breakdown. There are two different variations of this screen for 'LMJ\*' activities (each variation is shown). It will look different depending on whether the data being displayed was entered prior to release 9.0 or "by year" post release 9.0. See this [web page](#) for guidance from the CDBG Program Office on completing this screen.



#### ENTERING BENEFICIARY COUNTS FOR DIRECT BENEFIT ACTIVITIES:

For all LMJ activities, beneficiary counts must be based on **Persons**.

#### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <Enter> to go to the next screen in the completion path.

#### Program year:

1. This will only display when you have entered an 'I' in the "Insert/Delete program year(I/D)?" question, or when there is no data present, as in when you first enter an activity. Type the year to be inserted and press enter.

**Note:** This field, and the next two fields described are mutually exclusive, so they are displayed on the same line, in the same place at different times depending on when they're needed.

#### Totals for program year:

2. Display only: This will only display for converted or new data. Data entered prior to release 9.0 that has not been converted will display the field below instead. Beginning with release 9.0, direct benefit data should be reported on an annual basis. The program year for which data is being reported is displayed here.

#### Totals as of yyyy/mm/dd

3. Display only: For activities where benefit data was entered prior to release 9.0 and the data is unconverted, the system will display the total counts previously entered. Those counts will be considered to be cumulative through the date of release 9.0.

#### Race

4. Type the race code of the counts to be entered on this line. Report the number of persons/households served by the following groups for all direct benefit activities where you maintain a personal record. If you don't maintain a

personal record, provide the information from a spot survey or an estimate of persons using the facility or service.

Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.

## **RACE, cont'd**

Effective with Version 7.0, Hispanic will be an ethnicity category within IDIS that cuts across all races. Those who are White, Black, Asian, Pacific Islander, American Indian, or Other Multi-Racial may also be counted as being Hispanic.

Race Codes are available using the F1 key on this field.

Valid race codes are as follows:

11. White. A person having origins in any of the original peoples of Europe, North Africa or the Middle East.
12. Black or African American. A person having origins in any of the black racial groups of Africa. Terms such as "Haitian" or "Negro" can be used in addition to "Black or African American."
13. Asian. A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand and Vietnam.
14. American Indian or Alaska Native. A person having origins in any of the original peoples of North and South America (including Central America), and who maintains affiliation or community attachment.
15. Native Hawaiian or Other Pacific Islander. A person having origins in any of the original people of Hawaii, Guam, Samoa or other Pacific Islands.
16. American Indian or Alaska Native & White. A person having these multiple race heritages as defined above.
17. Asian & White. A person having these multiple race heritages as defined above.
18. Black or African American & White. A person having these multiple race heritages as defined above.
19. American Indian or Alaska Native & Black or African American. A person having these multiple race heritages as defined above.
20. Other Multi Racial. For reporting individual responses that are not included in any of the other categories listed above.

**Totals for “All” and  
“Hisp”**

5. These columns will vary in title and numbers depending on whether the data is converted or unconverted. Also, the column headers will look different depending on whether the counts are by Households or by Persons. All of the fields in this group are numeric and are optional.

**Insert/Delete program  
year(I/D)?**

6. If you need to enter a new year of benefit data, type “I” in this field. A clean screen will be presented where you will enter the new year and appropriate counts.

To delete a previously entered year’s data, type “D” in this field. The data for the year displayed on the screen will be deleted. marypat

**NOTE:**

If you answered **Y** to Presumed Benefit on CDBG06 screen, you **do** need to report the number benefiting from the activity and their racial breakout on this screen. However, you do not need to enter the number of beneficiaries that are low and extremely low income on the Beneficiary Income Levels (CDBG13) screen. (You **will** need to enter the Total Low/Mod Beneficiaries which should be the same number as the Total Number Benefiting from the Activity that you enter on this screen.) For more background, read the [CDBG Guidance](#) for completing the CDBG08 screen.

The two variations of the CDBG08 screen are shown here:

Format with data “by Persons” entered post – release 9.0:

MM/DD/YY HH:MM		CDBG DIRECT BENEFIT DATA - by Persons		CDBG08	
Grantee Activity ID XXXXXXXXXXXXXXXXXXXX		IDIS Activity ID XXXXXXXX			
Activity Name XX		Nat1/Obj XXXXX			
[ Program Year: ____ ]					
[Totals for program year: CCYY ____]					
Totals		-Totals (All Years)-			
Race	--All-- --Hisp-	--All--	--Hisp-		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
Totals:	9,999,999 9,999,999	9,999,999	9,999,999		
Insert/Delete program year(I/D)? _					
XXXXXXXXXXXXXXXX message line XX					
F1=HELP F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE					
F15=SWITCH TO COUNTS BY HOUSEHOLDS F17=PREV YEAR F18=NEXT YEAR					

Format with data entered pre-release 9.0, “by Persons”:

MM/DD/YY HH:MM		CDBG DIRECT BENEFIT DATA - by Persons		CDBG08	
Grantee Activity ID XXXXXXXXXXXXXXXXXXXX		IDIS Activity ID XXXXXXXX			
Activity Name XX		Nat1/Obj XXXXX			
Totals as of CCYY / MM / DD					
Totals		-Totals (All Years)-			
Race	--All-- --Hisp-	--All--	--Hisp-		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
---	-----	999,999	999,999		
Totals:	9,999,999 9,999,999	9,999,999	9,999,999		
Fem-HH: _____					
Insert/Delete program year(I/D)? _					
XXXXXXXXXXXXXXXX message line XX					
F1=HELP F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE					
F15=SWITCH TO COUNTS BY HOUSEHOLDS					

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Program Year:	✓	Only displayed when you have requested an insert or there are no years present, you must type a valid year to be inserted.	4 Digit year
Race	✓	11 White 12 Black/African American 13 Asian 14 American Indian/Alaskan Native 15 Native Hawaiian/Other Pacific Islander 16 American Indian/Alaskan Native & White 17 Asian & White 18 Black/African American & White 19 American Indian/Alaskan Native & Black/African 20 Other Multi-Racial 21 Asian/Pacific Islander (obsolete for display only) 22 Hispanic (obsolete for display only)	2 numeric characters.
All counts column by persons	✓ <sup>1</sup>	Report the number of persons benefiting from this activity  Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.	6 numeric characters.

<sup>1</sup> At least one entry must be made for any line entered. Zero is a valid entry.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Hisp counts column by persons		<p>Report the number of Hispanic persons benefiting from this activity. This is a subset of the "All" category above and must be &lt;= that count for each category.</p> <p>Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.</p>	6 numeric characters.
Press <Enter> to save the information and proceed to the next screen.			

### 8.8.3 Entering Additional Low/Mod Beneficiary Data (CDBG13)

**SCREEN:** CDBG Beneficiary Income Levels screen (CDBG13)

**PURPOSE:** For LMJ\* activities, this screen further describes the number of low/mod persons benefiting from the CDBG activity. There are two different variations of this screen for 'LMJ\*' activities (each variation is shown). It will look different depending on whether the data being displayed was entered prior to release 9.0 or "by year" post release 9.0. See this [web page](#) for guidance from the CDBG Program Office on completing this screen.



**NOTE:**

If you answered **Y** to Presumed Benefit on the CDBG Activity Information screen, you **do** need to enter the number of beneficiaries that are low and extremely low income on this screen. For more background, read the [CDBG Guidance](#) for completing the CDBG08 screen.

#### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to go to the next screen in the completion path.

**Program year:**

1. This will only display when you have entered an 'I' in the "Insert/Delete program year(I/D)?" question, or when there are no years present. Type the year to be inserted and press enter.

**Note:** The two display only fields described directly below this are mutually exclusive to this one, so they are displayed on the same line, in the same place at different times depending on when they're needed.

**Totals For Program Year:**  
YYYY

2. Display only: The year for which you are entering/viewing data.

**Totals as of**  
YYYY/MM/DD

3. Display only: For activities where benefit data was entered prior to release 9.0 and the data is unconverted, the system will display the total counts previously entered. Those counts will be considered to be cumulative through the date of release 9.0.

**Total Extremely Low  
Income Beneficiaries**

4. Type the number of persons benefiting from this activity whose income does not exceed 30% of the median family income.



**Total Low Income  
Beneficiaries**

5. Type the number of persons benefiting from this activity whose income exceeds 30% but does not exceed 50% of the median family income.

**Total Moderate Income  
Beneficiaries**

6. Type the number of persons benefiting from this activity whose income exceeds 50% but does not exceed 80% of the median family income

**Total Non-Low/Moderate  
Beneficiaries**

7. Type the total number of persons benefiting from this activity whose income exceeds 80% of the median family income.

**Insert/Delete program  
year(I/D)?**

8. If you need to enter a new year of benefit data, type “I” in this field. A clean screen will be presented where you will enter the new year and appropriate counts.

To delete a previously entered year's data, type “D” in this field. The data for the year displayed on the screen will be deleted. It will also delete any low income data associated with the year being deleted.

Format with data “by Persons” entered post – release 9.0:

Format with data “by Persons” entered post – release 9.0:

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DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
IDIS Activity ID		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Natl/Obj		Carried forward from the CDBG NATIONAL OBJECTIVE Screen (CDBG01)	Protected field
Persons Benefiting		Carried forward from the Direct Benefit Screen (CDBG08).	Protected field
Total Extremely Low Income Beneficiaries		Type the number of persons benefiting from this activity whose income does not exceed 30% of the median family income.	6 numeric characters
Total Low Income Beneficiaries		Type the number of persons benefiting from this activity whose income exceeds 30% but does not exceed 50% of the median family income.	6 numeric characters
Total Moderate Income Beneficiaries		Type the number of persons benefiting from this activity whose income exceeds 50% but does not exceed 80% of the median family income.	6 numeric characters
Total Non-Low/Moderate Beneficiaries		Type the number of persons benefiting from this activity whose income exceeds 80% of the median family income.	6 numeric characters
Percentage of Low/Mod Beneficiaries		This field is calculated for you automatically when you press <F3> or <F9>. It shows the Total Low/Mod Beneficiaries as a percentage of Total Beneficiaries.	Protected field
Press <Enter> to save the information and proceed to the next screen.			

## 8.8.4 Entering Job Creation/Retention Data (CDBG11)

### SCREEN: Job Creation/Retention (CDBG11)

**PURPOSE:** On this screen, you describe the manner in which assistance is being provided for an activity that will involve the creation or retention of jobs for low/moderate income persons. The screen lets you enter the number of full time jobs and part-time jobs by hours that are expected to be created by the activity. You also enter the number of full time jobs and part-time jobs that are actually created and retained by the activity. There are two different variations of this screen (each variation is shown). It will look different depending on whether the data being displayed was entered prior to release 9.0 or “by year” post release 9.0. All of the fields are explained here without respect to whether you will actually see them. You will see different fields depending on whether the data was entered before or after release 9.0. See this [web page](#) for guidance from the CDBG Program Office on completing this screen.

---

#### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <Enter> to save the information and display the CDBG Direct Benefit Continued screen (C04MC02).

#### Effective with Version 6.7, for entitlement activities for EXPECTED values:

- You must enter a value (0 is valid) in either the Total F/T field or the Total P/T field to be able to save data on this screen.
- If you enter a value in the Total F/T field, you must enter a value (0 is valid) in the Total F/T LM field or you will not be able to save data on this screen. If you enter a value in the Total P/T field, you must enter a value (0 is valid) in the Total P/T LM field or you will not be able to save data on this screen.\*

#### Effective with Version 9.0:

- You will enter the “expected” counts at the start of the activity.
- You will enter “actual” counts at the end of each reporting year. If the activity spans only one year, you will only enter one set of actual counts. For activities that take several years to complete, the system will allow an entry for each reporting year.

---

\* These requirements do not apply to: 1) Activities being carried out by States and Insular Areas; 2) Activities with a status of “Completed” or “Cancelled;” 3) IDIS Act ID=1 through 4.

**EXPECT TO CREATE**

1. Enter the number of jobs in these categories that the activity is expected to create.

F/T	Total full-time jobs expected to be created.
F/T-LM	Total full-time jobs expected to be created for low to moderate income persons. (This is a subset of F/T.)
P/T	Part-time job hours expected to be created.
P/T-LM	Part-time job hours expected to be created for low to moderate-income persons. (This is a subset of P/T.)

For all **part-time jobs** expected to be and actually created, enter the total hours to be worked **each week**, and the total of those hours that are expected to be available to and actually taken by low/mods. The system will convert the part-time hours to full-time equivalents (FTEs) on the basis of 1 FTE = 40 hours.

For example, suppose a business plans to create a total of five part-time jobs. Three people will work 20 hours a week/each and two people will work 15 hours a week/each. All jobs are expected to be available to low/mods.

Under "Expect To Create" for both P/T and P/T-LM, enter 90.  $[(20 \times 3) + (15 \times 2) = 90]$ .

If all five part-time jobs are actually created and low/mod persons take the three 20 hour jobs and one 15 hour job, the entries under Actually Created would be: P/T 90 hours (because the total number of hours did not change); P/T LM, 75 hours (because only four of the jobs created were taken by low/mods).

**EXPECT TO RETAIN**

2. Enter the number of jobs in these categories that the activity is expected to retain.

F/T	Total full-time jobs expected to be retained.
F/T-LM	Total full-time jobs expected to be retained by low to moderate-income persons. (This is a subset of F/T.)
P/T	Part-time job hours expected to be retained.
P/T-LM	Part-time job hours expected to be retained by low to moderate-income persons. (This is a subset of P/T.)

---

**Program year:**

9. This will only display when you have entered an 'I' in the "Insert/Delete program year(I/D)?" question, or when there are no years present. Type the year to be inserted and

press enter.

**Note:** The two display only fields described directly below this are mutually exclusive to this one, so they are displayed on the same line, in the same place at different times depending on when they're needed.

---

**Actual Totals for  
program year: YYYY**

10. Display only: The year for which you are entering/viewing data.

---

**Actual Totals as of  
YYYY/MM/DD**

11. Display only: For activities where data was entered prior to release 9.0, the system will display the total counts previously entered. Those counts will be considered to be cumulative through the date of release 9.0.

**ACTUALLY CREATED**

3. Enter the number of jobs in these categories that the activity actually created.

F/T                      Total full-time jobs actually created.

F/T-LM                Total full-time jobs actually created and  
taken by low to moderate-income  
persons. (This is a subset of F/T.)

P/T                      Part-time job hours actually created.

P/T-LM                Part-time job hours actually created and  
taken by low to moderate-income  
persons. (This is a subset of P/T.)

**ACTUALLY RETAINED**

4. Enter the number of jobs in these categories that the activity actually retained.

F/T                      Total full-time jobs actually retained.

F/T-LM                Total full-time jobs actually retained by  
low to moderate income persons. (This  
is a subset of F/T.)

P/T                      Part-time job hours actually retained.

P/T-LM                Part-time job hours actually retained by  
low to moderate income persons. (This  
is a subset of P/T.)

**Insert/Delete program  
year(I/D)?**

7. If you need to enter a new year of benefit data, type "I" in this field. A clean screen will be presented where you will enter the new year and appropriate counts.

To delete a previously entered year's data, type "D" in this field. The data for the year displayed on the screen will be deleted.

**Note:** This action is not reversible and you will not be asked again. If you answer 'Y' to this prompt.

**Display cumulative  
totals(Y/N)?**

This will display only for the converted version of the CDBG11 screen. Type 'Y' in this field and press enter to display the cumulative totals screen.

---

The two variations of the CDBG11 screen are shown here:

Format with data entered post – release 9.0:

MM/DD/YY	HH:MM	CDBG JOB CREATION/RETENTION				CDBG11
Grantee Activity ID		XXXXXXXXXXXXXXXXXXXX		IDIS Activity ID		XXXXXXX
Activity Name		XX				Natl/Obj XXXXX
Estimates		TOTAL JOB COUNT		TOTAL WEEKLY HRS		PERCENT
		F/T	F/T-LM	P/T	P/T-LM	LOW/MOD JOBS
Expect to Create:		_____	_____	_____	_____	999.99%
Expect to Retain:		_____	_____	_____	_____	999.99%
Actual Totals for program year: CCYY						
		F/T	F/T-LM	P/T	P/T-LM	LOW/MOD JOBS
Actually Created:		_____	_____	_____	_____	999.99%
Actually Retained:		_____	_____	_____	_____	999.99%
						Actual 99,999 FTE Jobs
Insert/Delete program year(I/D)? _				Display cumulative totals(Y/N)? _		
XXXXXXX (THIS IS THE MESSAGE LINE) XXX						
F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE						
F17=PREV YEAR F18=NEXT YEAR						

Format with data entered pre – release 9.0:

MM/DD/YY	HH:MM	CDBG JOB CREATION/RETENTION				CDBG11
Grantee Activity ID		XXXXXXXXXXXXXXXXXXXX		IDIS Activity ID		XXXXXXX
Activity Name		XX				Natl/Obj XXXXX
Estimates		TOTAL JOB COUNT		TOTAL WEEKLY HRS		PERCENT
		F/T	F/T-LM	P/T	P/T-LM	LOW/MOD JOBS
Expect to Create:		_____	_____	_____	_____	999.99%
Expect to Retain:		_____	_____	_____	_____	999.99%
Actual Totals as of YYYY / MM / DD						
		F/T	F/T-LM	P/T	P/T-LM	LOW/MOD JOBS
Actually Created:		_____	_____	_____	_____	999.99%
Actually Retained:		_____	_____	_____	_____	999.99%
						Actual 99,999 FTE Jobs
Insert/Delete program year(I/D)? _						
XXXXXXX (THIS IS THE MESSAGE LINE) XXX						
F3=VALDT F4=MAIN MENU F5=PROJ INFO F7=PREV F8=NEXT F9=SAVE						
F17=PREV YEAR F18=NEXT YEAR						

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
<p align="center"><b>Expect To Create</b></p> <p><b>Effective with Version 6.7, for entitlement activities, you must enter a number greater than zero in at least one of the following two fields or the expected to retain equivalent to be able to save data on this screen.</b></p> <p><b>If you enter a value in the Total F/T field, you must enter a value (0 is okay) in the Total F/T LM field or you will not be able to save data on this screen. If you enter a value in the Total P/T field, you must enter a value (0 is okay) in the Total P/T LM field or you will not be able to save data on this screen.</b></p>			
Total Job Count F/T/		Enter the number of full-time jobs expected to be created.	4 numeric characters
Total Job Count F/T-LM		Enter the number of full-time jobs expected to be created for low to moderate-income persons. (This is a subset of F/T.)	4 numeric characters
Total Hours P/T/		Enter the number of part-time job hours expected to be created.	4 numeric characters
Total Hours P/T-LM		Enter the number of part-time job hours expected to be created for low to moderate-income persons. (This is a subset of P/T.)	4 numeric characters
Percent Of Low/Mod Jobs		Automatically calculated when you press <F3> or <F9> to update the screen.	Protected field
<p align="center"><b>Expect To Retain</b></p> <p><b>Effective with Version 6.7, for entitlement activities, you must enter a number greater than zero in at least one of the following two fields or the expected to create equivalent to be able to save data on this screen.</b></p> <p><b>If you enter a value in the Total F/T field, you must enter a value (0 is okay) in the Total F/T LM field or you will not be able to save data on this screen. If you enter a value in the Total P/T field, you must enter a value (0 is okay) in the Total P/T LM field or you will not be able to save data on this screen.</b></p>			
Total Job Count F/T/ Total Job Count F/T-LM		Enter the number of full-time jobs expected to be retained.  Enter the number of full-time jobs expected to be	4 numeric characters



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
		retained for low to moderate-income persons. (This is a subset of F/T.)	
Total Hours P/T/		Enter the number of part-time job hours expected to be retained.	4 numeric characters
Total Hours P/T-LM		Enter the number of part-time job hours expected to be retained for low to moderate-income persons. (This is a subset of P/T.)	4 numeric characters
Percent Of Low/Mod Jobs		Automatically calculated when you press <F3> or <F9> to update the screen.	Protected field
Program year:	✓	When prompted for this entry, type a valid year for which you would like to store data.	4 numeric characters (year)
<b>Actually Created</b>			
Total Job Count F/T/		Enter the number of full-time jobs actually created.	4 numeric characters
Total Job Count F/T-LM		Enter the number of full-time jobs actually created for low to moderate-income persons. (This is a subset of F/T.)	4 numeric characters
Total Hours P/T/		Enter the number of part-time job hours actually created.	4 numeric characters
Total Hours P/T-LM		Enter the number of part-time job hours actually created for low to moderate-income persons. (This is a subset of P/T.)	4 numeric characters
Percent Of Low/Mod Jobs		Automatically calculated when you press <F3> or <F9> to update the screen.	Protected field
<b>Actually Retained</b>			
Total Job Count F/T		Enter the number of full-time jobs actually retained.	4 numeric characters
Total Job Count F/T-LM		Enter the number of full-time jobs actually retained for low to moderate-income persons. (This is a subset of F/T.)	4 numeric characters
Total Hours P/T		Enter the number of part-time job hours actually retained.	4 numeric characters
Total Hours P/T-LM		Enter the number of part-time job hours actually retained for low to moderate-income persons. (This is a subset of P/T.)	4 numeric characters

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Percent Of Low/Mod Jobs		Automatically calculated when you press <F3> or <F9> to update the screen.	Protected field
FTE Jobs		Automatically calculated when you press <F3> or <F9> to update the screen.	Protected field

## 8.9 The CDBG SBA, SBR, SBS, URG Path Screens

When you select a National Objective Code of SBA, SBR, SBS or URG on the CDBG Activity Screen (C04MC01), the system displays this series of screens.

Even though this set of screens display for all of the above NOCs, you only need to complete them for SBA activities.

Entitlement Grantees	State Grantees
*Funding Sources (CDBG02) <i>See Section 8.5.1</i>	*Funding Sources (CDBG02) <i>See Section 8.5.1</i>
*Organization carrying out activity (CDBG03) <i>See Section 8.5.2</i>	*Organization carrying out activity (CDBG03) <i>See Section 8.5.2</i>
*Subrecipient/CBDO Screen (CDBG04) <i>See Section 8.5.2</i>	*Subrecipient/CBDO Screen (CDBG04) <i>See Section 8.5.2</i>
*Form of Assistance (CDBG05) <i>See Section 8.5.3</i>	*Form of Assistance (CDBG05) <i>See Section 8.5.3</i>
*CDBG Activity Screen (CDBG06) <i>See Section 8.5.4</i>	*CDBG Activity Screen (CDBG06) <i>See Section 8.5.4</i>
If NOC is "SBA", Slum/Blight Area (CDBG12)	If NOC is "SBA", Slum/Blight Area (CDBG12)
*If Matrix Code is 14a, 14b, 14c, 14d, 14f, 14g, or 16a, CDBG Housing Rehabilitation Screen (CDBG09) <i>See Section 8.7.3</i>	*If Matrix Code is 14a, 14b, 14c, 14d, 14f, 14g, or 16a, CDBG Housing Rehabilitation Screen (CDBG09) <i>See Section 8.7.3.</i>
*If Matrix Code 18a or 18b, Job Creation/Retention Screen (CDBG11) <i>See Section 8.8.4</i>	*CDBG Direct Benefit Data Screen (CDBG08) <i>See Section 8.7.4</i>
*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>	*CDBG Beneficiary Income Levels Screen (CDBG13) <i>See Section 8.7.5</i>
*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>	*If Matrix Code 18a or 18b, Job Creation/Retention Screen (CDBG11) <i>See Section 8.8.4</i>
	*If Displacement, CDBG Displacement Screen (CDBG15) <i>See Section 8.10.1</i>
	*If 1:1 Replacement, CDBG 1:1 Replacement Screen (CDBG16) <i>See Section 8.10.2</i>

(Screens with an \* are used by more than one NOC and are described elsewhere in this chapter.)

## 8.9.1 Entering Slum/Blight Area Data (CDBG12)

**SCREEN:** Slum/Blight Area screen

**(CDBG12)**

**PURPOSE:** For SBA activities, this screen lets you record slum/blight area information.



**NOTE:**

Effective with Version 6.7, for an entitlement activity, you must enter all information requested on this screen (except Public Improvement Type/Condition if it doesn't apply) before you can fund the activity. If an activity is already funded and the required information has not been entered, you will not be able to revise and save the CDBG12 screen until the required information is entered.\*

---

### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to save the information and proceed to the next screen.

#### **BOUNDARIES**

1. Type a description of the boundaries of the designated area. (This is NOT the Census tract/block group data required for an LMA.)

#### **PERCENTAGE DETERIORATED BUILDINGS**

2. Type the percentage of buildings that were deteriorated when the area was designated slum/blight.

#### **PUBLIC IMPROVEMENT TYPE/CONDITION**

3. If qualifying on the basis of the condition of public improvements, type a brief description identifying each type of improvement located within the area and its condition at the time the area was designated slum/blight.

#### **SLUM/BLIGHT DESIGNATION YEAR**

---

4. Type the year the area was designated slum/blight.

---

\* This requirement does not apply to: 1) Activities being carried out by States; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

```

MM/DD/YY  HH:MM                      SLUM/BLIGHT AREA                      CDBG12

Grantee Activity ID xxxxxxxxxxxxxxxxxxxx          IDIS Activity ID zzzzzzzz9
Activity Name      xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx Natl/Obj xxxxxx

Boundaries: _____
              _____
              _____

Percentage Deteriorated Buildings/Qualified Properties: _____ %

Public Improvement/Type Condition: _____

    Slum/Blight Designation Year:  _____

(This line reserved for messages)

F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9=SAVE

```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Boundaries	✓*	Type a description of the boundaries of the Slum/Blight area.  <b>NOTE:</b> Do not use this field to document the Census tract/block group data required for an LMA. For SMA, the boundaries of the designated area must be specified.	180 alpha numeric characters
Percentage Deteriorated Buildings	✓*	Type the percentage of buildings that were deteriorated when the area was designated slum/blight.	99.99 (numeric characters)

\* Required for all CDBG Entitlement activities before activity can be funded. This requirement does not apply to: 1) Activities being carried out by States; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Public Improvement Type/Condition		If qualifying on the basis of the condition of public improvements, type a brief description identifying each type of improvement located within the area and its condition at the time the area was designated slum/blight.	40 alpha numeric characters
Slum/Blight Designation Year	✓*	Type the year the area was designated slum/blight.	4 numeric characters
Press <Enter> to save the information and return to the Setup Activity Screen (C04MA08).			

---

\* Required for all CDBG Entitlement activities before activity can be funded. This requirement does not apply to: 1) Activities being carried out by States; 2) Activities with a status of "Completed" or "Cancelled;" 3) IDIS Act ID=1 through 4.

## 8.10 Displacement/Replacement Options

If you indicated on the CDBG Activity Screen (CDBG06) that your activity involves one-for-one replacement or displacement, you will see an additional set of screens for each of these options as the very last screens in the CDBG path before you return to the “Money” screen (CO4MA08).

Because you may associate these options with *any* National Objective Code, we describe these screens here rather than in the individual NOC sections.



### NOTE:

Refer to Reg. 570.606 for a discussion of displacement, relocation, and replacement. These regulations may be viewed at the web site:  
<http://www.hud.gov/offices/cpd/communitydevelopment/rulesandregs/regulations/570606.cfm>

### 8.10.1 Entering Displacement Data (CDBG15)

**SCREEN:** CDBG Displacement screen(s) (CDBG15)

**PURPOSE:** Effective with Version 7.0, CDBG grantees need to complete a separate CDBG Displacement screen for *each* Census Tract and city that is included in an activity involving displacement, i.e., any household, business, farm, or nonprofit organization that moved permanently from real property as a direct result of rehabilitation, demolition, or acquisition of any CDBG-assisted activity.

(You indicate an activity includes displacement when you **X** the “Displacement” field on the CDBG Activity screen, CDBG06.)

A displacement activity must contain at least one Census Tract Displacement screen where you indicate the number of households, by racial category, who were *displaced* by the activity and the number of households who *remain* in the same Census Tract, by racial category, after relocation. If households from one or more racial categories were *relocated* to another Census Tract or city, you will need to complete one or more additional Displacement screens.

- If no Displacement data exists for the activity, when you first see the Displacement screen, IDIS prompts for the Census Tract to be added:

MM/DD/YY	HH:MM	CDBG DISPLACEMENT	CDBG15
Grantee Activity ID		XXXXXXXXXXXXXXXXXXXX	IDIS Activity ID XXXXXXXX
Activity Name		XX Natl/Obj XXXXX	
Census Tract / City		_____	Tract/City# ____ of ____

If you enter a valid Census Tract in the format 1234.56, IDIS will activate all three columns on the Displacement screen: “Displaced,” “Remain In,” and “Relocated To.” If you enter any other text in this field, for example a city name, unknown, or a Census Tract in an incorrect format, IDIS will activate only the “Relocated To” column. When a displacement activity involves more than one Census Tract or city, complete information for the first Census Tract, press <F9> to save the data, then press <F11> to insert an additional Census Tract or city. On these additional screens, you indicate the number of households by race and ethnicity who were relocated from the initial Census Tract to this Census Tract or city.

- If displacement data exists for the activity, IDIS shows the lowest-numbered Census Tract for the activity, followed by any other Census Tracts, followed by city locations in alphabetical order. Press <F18> to scroll up through the list, <F17> to scroll down. Press <F11> to insert an additional Census Tract or city. Press <F13> to delete an incorrect Census Tract or city.
- A new field on the top right of the screen displays the number of existing Displacement screens for this activity. Two new columns to the far right of the race/ethnicity data will display the cumulative totals for *all* Displacement screens for this activity. This value will automatically update when you press <F9> to save data on any Displacement screen for the activity.

IDIS performs the following edits on *all* Displacement screens for an activity before users will be able to proceed to the next screen in the CDBG flow.

- By race, across all Displacement screens, the sum of “Remain In” Total + “Relocated To” Total must equal the “Displaced” Total, and the sum of “Remain In” Hispanic + “Relocated To” Hispanic must equal “Displaced From” Hispanic. When these values don’t agree, IDIS will display the Balance Resolution screen (C04MC07) where you can adjust the “Displaced From,” “Remain In,” and “Relocated To” values that are out of balance. (Press <F18> to scroll up through all Balance Resolution screens; <F17> to scroll down.) If you need to create a new Displacement screen to resolve the balance discrepancy, press <F7> to return to the Displacement screen, then press <F11> to insert a new record.
- For a single Displacement screen, the value of “Remain In” Total must never exceed the value of “Displaced From” Total, and the value of “Remain In Hispanic” must never exceed the value of “Displaced From Hispanic.”
- For a single Displacement screen, the Hispanic value for a race must never exceed the Total value for a race within the “Displaced From,” “Remain In,” and “Relocated To” sections.
- For a single Displacement screen, the Total “Relocated To” value for a race must never exceed the sum of Total “Displaced From” values from all other Displacement screens for the activity; and the Hispanic “Relocated To” value for a race must never exceed the sum of Hispanic “Displaced From” values from all other Displacement screens for the activity.



## How To Complete This Screen:



**CENSUS TRACT OR CITY**

**RACE**

**DISPLACED FROM/  
REMAIN IN/  
RELOCATED TO**

Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <F9> to save the information. If you need to enter additional Census Tracts, press <F10> to display a blank screen.

1. Enter the Census Tract number, the city name, or unknown.

Every displacement activity must contain at least one Census Tract.

2. Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.

Effective with Version 7.0, Hispanic will be an ethnicity category within IDIS that cuts across all races. Those who are White, Black, Asian, Pacific Islander, American Indian, or Other Multi-Racial may also be counted as being Hispanic.

Enter the number of households who fall into the following racial and ethnicity categories.

- For the source Census Tract, indicate the number of households, by race, who were "Displaced From" this Tract and the number who "Remain In" this tract. If the number "Remain In" is less than the number "Displaced From," you will need to enter one or more additional Census Tracts or cities to indicate where these households were "Relocated To."
- If you entered a City name or "Unknown" in the previous field, IDIS lets you complete only the "Relocated To" fields on this screen.

**RACE, Cont'd**

**DISPLACED FROM/  
REMAIN IN/  
RELOCATED TO**

<b>Race</b>	<b>Total #</b>	<b># Hispanic</b>
White		
Black/African American		
Asian		
American Indian/Alaskan		
Native		
Native Hawaiian/Other		
Pacific Islander		
American Indian/Alaskan		
Native & White		
Asian & White		
Black/African American &		

3. If you need to enter racial and ethnicity data for additional Census Tracts or cities, press <F9> to save the data on this screen, then press <F11> to insert an additional Census Tract or city.

```

MM/DD/YY  HH:MM                                CDBG15
CDBG PLACEMENT                                CDBG15

Grantee Activity ID XXXXXXXXXXXXXXXXXXXX          IDIS Activity ID XXXXXXXX
Activity Name      XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  Natl/Obj XXXXX
Census Tract / City XXXXXXXXXXXXXXXX              Tract/City# ____ of ____

----- R A C E -----
      WHITE:
BLACK/AFRICAN AMERICAN:
      ASIAN:
AM INDIAN/ALASKAN NATIVE:
NAT.HAWAIIAN/OTH.PACIFIC ISL:
AM.INDIAN/ALASKAN NAT.&WHITE:
      ASIAN & WHITE:
BLACK/AFRICAN AM. & WHITE:
AM.INDIAN/ALSKN & BLCK/AFRCN:
      OTHER MULTI-RACIAL:
      ASIAN/PACIFIC ISLANDER:
      HISPANIC:

Continue inserting Census Tract / City names (Y/N)? _
XXXXXXX (THIS IS THE MESSAGE LINE) XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
F3=VALDT  F4=MAIN MENU  F5=PROJ INFO  F7=PREV  F8=NEXT  F9 = SAVE
F11=INSERT F13=DELETE  F17 = DOWN  F18=UP

```

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Grantee Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
HUD Activity Number		Carried forward from the Setup Activity Screen (C04MA01).	Protected field
Activity Name		Carried forward from the Setup Activity Screen (C04MA01).	Protected field

\* This field will not display for activities created after Version 7.0. For existing activities, IDIS will copy any value in the Hispanic race category to the new Hispanic ethnic category. Grantees will have the option of revising existing racial data for “Asian/Pacific Islander” and “Hispanic” until April 1, 2004.

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Census Tract or City		Type the Census tract number, the city name, or unknown. (If you enter a city name or unknown, you only need to complete the Relocated To data fields for this screen.)	Census Tract: 7 numeric characters  City: 15 alpha characters
Race  Displaced From/ Remain In/ Relocated To  Total # #Hispanic		<p>Effective with Version 7.0, IDIS follows the OMB standard for reporting racial and ethnicity data which includes five single race categories and five multi-race categories. IDIS data entry and display screens for activities created before Version 7.0 will show any existing counts for race data including those in the "Asian/Pacific Islander" and "Hispanic" categories. Activities created after Version 7.0 will not.</p> <p>Effective with Version 7.0, Hispanic will be an ethnicity category within IDIS that cuts across all races. Those who are White, Black, Asian, Pacific Islander, American Indian, or Other Multi-Racial may also be counted as being Hispanic.</p> <p>Enter the number of households who fall into the listed racial and ethnicity categories.</p> <p>For the source Census Tract, indicate the number of households, by race, who were "Displaced From" this Tract and the number who "Remain In" this tract. If the number "Remain In" for any race is less than the number "Displaced From," you will need to enter one or more additional Census Tracts or cities to indicate where these households were "Relocated To."</p> <p>If you entered a City name or "Unknown" in the previous field, IDIS lets you complete only the "Relocated To" fields on this screen.</p>	5 numeric characters



### 8.10.1.1 Resolving Out of Balance Displacement Data (CDBG-H9)

By race, across all Displacement screens, the sum of "Remain In" Total + "Relocated To" Total must equal the "Displaced" Total, and the sum of "Remain In" Hispanic + "Relocated To" Hispanic must equal "Displaced From" Hispanic. When these values don't agree, IDIS will not let you continue on to the next screen in the CDBG sequence until you adjust the "Displaced From," "Remain In," and "Relocated To" values that are out of balance.

In the example shown, four White households were displaced from Census Tract 0001.00. One White household remained in this census tract, one White household was relocated to "City" and one White household was relocated to "Greece." Since four total White households were displaced, you must indicate the disposition of the fourth White household. You can increase or decrease the "Relocated To" amount for any Census Tract or city *except* the source Census Tract. On the source Census Tract, you can increase or decrease the "Displaced From" and "Remain In" counts.

If the values for more than one race are out of balance, press <F18> to scroll up; <PF17> to scroll down. If you need to create a new Displacement screen to resolve the balance discrepancy, press <F7> to return to the Displacement screen, then press <F11> to insert a new record.

MM/DD/YY HH:MM		CDBG DISPLACEMENT BALANCE RESOLUTION SCREEN				CDBG-H9		
Grantee Activity ID		XXXXXXXXXXXXXXXXXXXX				IDIS Activity ID		XXXXXXX
Activity Name		XX				Natl/Obj		XXXXX
Race		XX						
Census Tract Or City	-Displacd Fr- Total# #Hisp	- Remain In - Total# #Hisp	- Relctd To - Total# #Hisp					
-----	-----	-----	-----					
_____	_____	_____	_____					
_____	_____	_____	_____					
_____	_____	_____	_____					
_____	_____	_____	_____					
_____	_____	_____	_____					
_____	_____	_____	_____					
_____	_____	_____	_____					
Totals:	999999 999999	999999 999999	999999 999999					
	-----	-----	-----					

F7=PREV    F17=DOWN    F18=UP

## 8.10.2 Entering 1:1 Replacement Data (CDBG16)

### SCREEN: CDBG 1-1 Replacement Screen (CDBG16)

**PURPOSE:** You only see this screen if you **X'd** the One-for-One Replacement field on the CDBG Activity screen (CDBG06). Use this screen to record and track housing units that must be replaced because of the conversion or demolition of one or more occupied or vacant occupiable lower-income dwelling units. One for one replacement is also commonly called the *Barney Frank* provision.

This screen fulfills the requirements of the Housing and Community Development (HCD) Act and CDBG regulations. As a CDBG grantee, you must list all units that have been converted or demolished, as well as identify the replacement units.



#### NOTE:

Under the one-for-one replacement rule, you must provide replacement dwelling units whenever occupied and vacant occupiable low/moderate dwelling units are demolished or converted to another use. Conversion to another use occurs when an activity (typically rehabilitation of a low/moderate income dwelling unit) results in that unit no longer being a low/mod income unit because either:

- As a result of the activity, the rent exceeds the Section 8 fair market rent (FMR); or
- The unit has been converted to a use other than housing.

### How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to go to the next screen.

Enter data on converted/demolished units on the lines beginning with a **D**; and the replacement information into the lines beginning with an **R**.

#### DEMOLISHED- CONVERTED ADDRESS (D)/ REPLACEMENT ADDRESS (R)

1. Type the street address of the structure in which the housing units were converted/demolished (**D**) and replaced (**R**), as appropriate.

If you leave the Replacement Address field blank, enter the Agreement Exception Date in the Agreement Executed field.

**# BEDROOMS**

2. Type the number that corresponds to the number of bedroom units converted/demolished and replaced in each category.

**0/1** Zero or one bedroom units

**2** Two bedroom units

**3** Three bedroom units

**4** Four bedroom units

**5+** Five or more bedroom units

**AGREEMENT  
EXECUTED**

3. For housing that is privately owned, type the date the grant or loan agreement for CDBG assistance (between the grantee and the person owning or controlling the property) was executed.

For housing that is owned by the grantee or subrecipient, type the date that the contract for demolition or conversion between the grantee or subrecipient and the contractor was executed.

If the Replacement Address field is blank, type the Agreement Exception Date.

**AVAILABLE**

4. If you did not type an Exception Date, type the date the replacement unit(s) will be available.

**DESCRIPTION**

5. Tpe any additional information about this converted/demolished and replaced unit(s).

**ADDITIONAL ENTRIES**

6. If you need to enter data for more than three converted/demolished and replaced addresses, type a **Y** to display another blank screen.





DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
3		Type the number of 3 bedroom units for the address.	2 numeric characters
4		Type the number of 4 bedroom units for the address.	2 numeric characters
5+		Type the number of 5 bedroom units for the address.	2 numeric characters
Total		Automatically calculated when you press <F3> or <F9> to update the screen.	Protected field
Agreement Executed		<p>For housing that is privately owned, type the date the grant or loan agreement for CDBG assistance between the grantee and the person owning or controlling the property was executed.</p> <p>For housing that is owned by the grantee or subrecipient, type the date that the contract for demolition or conversion between the grantee or subrecipient and the contractor was executed.</p> <p>If the Replacement Address field is blank, type the Agreement Exception Date.</p>	mm/dd/yyyy
Available		If you did not type an Exception Date, type the date the replacement units will be available.	mm/dd/yyyy
Description		Type any additional information on the units being demolished/converted/replaced.	
Additional Entries		Type a <Y> to indicate if more lines are needed to add additional address entries.	Y or blank
Press <Enter> to save the information.			

## 8.11 Maintaining the CDFI Areas and NRSA Tables

Before you can specify a Community Development Financial Institution (CDFI) Area or Neighborhood Revitalization Strategy Area on the CDBG Activity Screen (CDBG06), it must already have been defined and assigned an ID in IDIS. You use the Table Maintenance module on the Utilities Menu to both add new CDFI Areas and Neighborhood Revitalization Strategy Areas and to modify the definitions of existing areas.

**REMINDER:**

Not everyone has access to Table Maintenance under the IDIS Utilities Menu. In order to have access to this area of IDIS, your Grantee Local Administrator must grant you Table Maintenance rights.

### 8.11.1 Selecting Table Maintenance from the Utilities Menu

**SCREEN:** Utilities Menu (no screen ID)

**PURPOSE:** On this screen you choose the Table Maintenance submenu.

---

**How To Complete This Screen:**

**TYPE SELECTION AND  
PRESS ENTER**

Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

1. On the IDIS Main Menu, select **Option F**, Table Maintenance, and press **<Enter>**. The system displays the Utilities Menu.
  2. On the Utilities Menu, type **04** and press **<Enter>**. The system displays the Table Maintenance Menu.
-

```
12/12/02      THE INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM  C04MM01
07:06:08
```

UTILITIES MENU

- 01 GRANTEE ID/EXCEPTIONS
- 02 PROGRAM CONTACTS
- 03 USER INFORMATION/PROFILE
- 04 TABLE MAINTENANCE
- 05 CONVERSION REQUEST
- 06 CONVERSION STATUS
- 07 BLOCK/UNBLOCK GRANTEES
- 08 BLOCK/UNBLOCK GRANTS
- 09 CPDTS DATA UPLOAD STATUS
- 10 RUN SPUFI
- 11 IDIS NEWS
- 12 LOCCS INTERFACE
- 13 MATCH LIABILITY
- 14 REPORTS PERIOD DATES

TYPE SELECTION AND PRESS ENTER    F 00

F4 = MAIN MENU    F7 = PREV

### 8.11.2 Choices on the Grantee Table Maintenance Menu (C04MU10)

**SCREEN:**                      Grantee Table Maintenance Menu                      (C04MU10)

**PURPOSE:** Use this screen to choose either CDFI Areas or Neighborhood Revitalization Strategy Areas.



**NOTE:**

The two CDFI Screens C04MU12 and C04MU11 work in tandem, as do the two Neighborhood Revitalization Strategy Area Screens, C04MU14 and C04MU13.

If your organization has never added a CDFI Area before, your first screen will be the C04MU12. Similarly, if your organization has never added a Neighborhood Revitalization Strategy Area before, your first screen will be C04MU14.

Once you have at least one record in a table, your first screen will always be the selection screen - the reverse of the sequence shown here.

## How To Complete This Screen:



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the field on this screen, press **<Enter>** to go to the next screen.

- Select 01 CDFI Areas or 02 for Neighborhood Revitalization Strategy Areas, then press **<Enter>**.

<p>THE INTEGRATED DISBURSEMENT AND INFORMATION SYSTEM C04MU10</p> <p>GRANTEE TABLE MAINTENANCE MENU</p> <p>TYPE A SELECTION AND PRESS ENTER :      00</p> <p>01 CDFI AREAS</p> <p>02 STRATEGY AREAS</p> <p>F4 = MAIN MENU</p>
---



DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
CDFI Name		Type the descriptive name for this CDFI area.	30 alpha numeric characters
Percentage of Low/Mod in CDFI Area		Type the percentage (using a decimal point) of low/mod residents in the CDFI area.	5 numeric characters
Press <Enter> to save the information.			

### 8.11.2.2 Choosing a CDFI Area to Revise (C04MU11)

**SCREEN:**                      **Revise CDFI Screen**                      **(C04MU11)**

**PURPOSE:** This screen identifies your existing CDFI Areas. From this screen you can select a CDFI to be revised; or indicate that you want to add another one to the system.



**NOTE:**

The CDFI ID is automatically generated after you create a CDFI ID on the CDFI Area Screen.

---

**How To Complete  
This Screen:**



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press **<Tab>** to go to the next field.)

When you have completed the fields on this screen, press **<Enter>** to save the information.

1. To modify an existing record, enter an **X** into the **SELECT ONE** field corresponding to the CDFI record to be updated.
  2. To add a new record, enter a **Y** next to the "Do you want to add a new record" prompt.
  3. Press **<Enter>** to display the CDFI Area Screen (C04MU12).
-

06/17/98	16:32	REVISE CDFI	C04MU11																														
<div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> <span>SELECT ONE</span> <span>CDFI ID</span> <span>CDFI NAME</span> </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; text-align: center;">x</td> <td style="width: 15%; text-align: center;">01</td> <td style="width: 70%;">THE COMMONWEALTH REDEVELOPMENT BANK OF TH</td> </tr> <tr><td style="text-align: center;">—</td><td style="text-align: center;">—</td><td></td></tr> <tr><td style="text-align: center;">—</td><td style="text-align: center;">—</td><td></td></tr> <tr><td style="text-align: center;">—</td><td style="text-align: center;">—</td><td></td></tr> <tr><td style="text-align: center;">—</td><td style="text-align: center;">—</td><td></td></tr> <tr><td style="text-align: center;">—</td><td style="text-align: center;">—</td><td></td></tr> <tr><td style="text-align: center;">—</td><td style="text-align: center;">—</td><td></td></tr> <tr><td style="text-align: center;">—</td><td style="text-align: center;">—</td><td></td></tr> <tr><td style="text-align: center;">—</td><td style="text-align: center;">—</td><td></td></tr> <tr><td style="text-align: center;">—</td><td style="text-align: center;">—</td><td></td></tr> </table> <p style="margin-top: 10px;">DO YOU WANT TO ADD A NEW CDFI RECORD? (Y/N): N</p> <p>ENTER X TO MAKE YOUR SELECTION</p> <p>F1 = HELP    F2 = FHELP    F3 = VALDT    F4 = MAIN MENU    F7 = PREV F9 = SAVE</p>				x	01	THE COMMONWEALTH REDEVELOPMENT BANK OF TH	—	—		—	—		—	—		—	—		—	—		—	—		—	—		—	—		—	—	
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DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Select One		Type an <X> and press <Enter> to select a CDFI Area to revise.	X
CDFI ID		Automatically calculated. IDIS automatically generates a CDFI identifier based on the sequence of entry of CDFI Areas.	Protected field
CDFI Name		Carried forward from the CDFI Areas Screen (C04MU12).	Protected field
Do You Want To Add A New CDFI Record? (Y/N):		Type a <Y> and press <Enter> to add a new CDFI entity in the system. This will take you to the CDFI Areas Screen (C04MU12).	Y / N
Press <Enter> to save the information.			



### 8.11.2.3 Adding Neighborhood Revitalization Strategy Areas (C04MU14)

**SCREEN:** Neighborhood Revitalization Strategy Areas Screen(C04MU14)

**PURPOSE:** Use this screen to establish or modify a CDBG Neighborhood Revitalization Strategy Area and identify the HUD approval date for the area.

---

**How To Complete  
This Screen:**



Where appropriate, type in the following data. (If the data typed does not fill the field, or if no data is appropriate, press <Tab> to go to the next field.)

When you have completed the fields on this screen, press <Enter> to go to the next screen.

**STRATEGY NAME**

1. Type the Neighborhood Revitalization Strategy Area name.

**HUD APPROVAL DATE**

2. Type the HUD approval date for the Neighborhood Revitalization Strategy Area.
- 

06/17/98 16:33	STRATEGY AREAS	C04MU14
STRATEGY NAME: LEIGH VALLEY REDEVELOPMENT TARGET ZONE		
HUD APPROVAL DATE: 07 / 01 / 1998		
DATA PROCESSED AND UPDATED TO DATABASE		
F3 = VALDT F4 = MAIN MENU F7 = PREV		
F8 = NEXT F9 = SAVE		

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Strategy Name		Type the Strategy Name.	30 alpha numeric characters
HUD Approval Date		Type the date HUD approved this strategy.	mm/dd/yyyy
Press <Enter> to save the information and move to the next screen.			

### 8.11.2.4 Choosing a Neighborhood Revitalization Strategy Area to Revise (C04MU13)

**SCREEN:** Strategy Selection screen (C04MU13)

**PURPOSE:** This screen identifies your existing Neighborhood Revitalization Strategy Areas. From this screen you can select a Neighborhood Revitalization Strategy Area to be revised; or indicate that you want to add another one to the system.

#### How To Complete This Screen:



1. To modify an existing record, enter an **X** into the **SELECT ONE** field corresponding to the Neighborhood Revitalization Strategy Area record to be updated.
2. To add a new record, enter a **Y** next to the "Do you want to add a new record" prompt.
3. Press **<Enter>** to display the Neighborhood Revitalization Strategy Area Screen (C04MU14).

06/17/98 16:34		STRATEGY SELECTION SCREEN		C04MU13
SELECT ONE	STRATEGY ID	STRATEGY NAME		
=	01	LEIGH VALLEY REDEVELOPMENT TARGET ZONE		
-	-	_____		
-	-	_____		
-	-	_____		
-	-	_____		
-	-	_____		
-	-	_____		
-	-	_____		
-	-	_____		
-	-	_____		
DO YOU WANT TO ADD A NEW STRATEGY RECORD? (Y/N) N				
ENTER X TO MAKE YOUR SELECTION				
F1 = HELP F3 = VALDT F4 = MAIN MENU F7 = PREV				
F9 = SAVE				

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Select One		Type an <X> and press <Enter> to select an existing Neighborhood Revitalization Strategy Area to revise.	X

DATA FIELD	REQ'D	DESCRIPTION	VALID ENTRIES
Strategy ID		Automatically calculated. IDIS automatically generates a Neighborhood Revitalization Strategy Area identifier based on the sequence of entry of Neighborhood Revitalization Strategy Areas.	Protected field
Strategy Name		Carried forward from the C04MU14 Screen.	Protected field
Do You Want To Add A New Strategy Record? (Y/N)		Type a <Y> and press <Enter> to add a new Neighborhood Revitalization Strategy Area in the system. This will take you to the C04MU14 screen.	Y / N
Press <Enter> to save the information.			